



BISG

BOOK INDUSTRY STUDY GROUP

annual report 2010-2011

BOOK INDUSTRY STUDY GROUP

Creating a more informed, empowered
and efficient book industry supply chain
for both physical and digital products.

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report

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Working to create a more informed, empowered
and efficient book industry supply chain for
both physical and digital products.



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A Letter from the BISG Chair and Vice-Chair

Dear BISG Members,

It's been quite a year!

Through all facets of its committee work, research and educational efforts, BISG made several impactful contributions to the industry this past year. Once again we were shown that BISG is the right organization for the book industry at this pivotal time in its history. BISG is the only organization that represents the entire spectrum of businesses, associations and stakeholders in our industry. That breadth of representation enables us to make more important contributions as the momentum of change continues to increase.

Perhaps one of the most exciting and certainly the most publicly recognized developments over the past year has been *BookStats*. For many years, we had all recognized the need for accurate industry-wide data. This new BISG and AAP partnership was a demand-driven response, created to deliver useful and accurate statistics on the size of the book industry. The participation of nearly 2,000 publishers of all sizes, the data model and the hard work of the BISG and AAP team provided us with the most robust set of estimates our industry may have ever had.

And BISG saw other important accomplishments over the 2010–2011 fiscal year:

- We expanded the Board of Directors not only in terms of seats, but also more importantly in terms of the industry stakeholders represented.
- We saw a significant growth in membership with 36 new participants from an even broader range of businesses and associations.
- Under a new BISG Unified Committee Structure, BISG and BISAC Committees were joined under the BISG umbrella and under the guidance of a Governing Council, comprised of the Committee Chairs and the BISG staff.
- Through the Sales Reporting Working Group of the EDI Committee, BISG published standardized data elements and templates for reporting sales for both digital and print products, and for Agency and wholesale models, enabling more efficient and automated processing of sales.
- The Rights Committee furthered its objective to facilitate system-to-system communication and reporting of rights transactions and royalties through the development of a Controlled Rights Vocabulary and transactional messaging for automated royalty reporting.
- The ID Committee has been working to help the industry with the issue of the identification of digital product through an initial survey about current practices.

The 8th Annual Making Information Pay Conference in May 2011 was a success, focusing on an overall theme of what companies need to do to meet the changing expectations of customers and the importance of agility and flexibility in providing the content customers want. Along with BISG’s traditional events, we offered a number of new conference formats this year:

- Digital Show & Tell
- Developing the 2020 Publishing Program: a NEXT Conference
- What College Students Think: MIP for Higher Ed Publishers

As we look ahead to 2011–2012, we expect another year of significant changes and continued momentum. Former Executive Director Scott Lubeck stepped down in May, prompting the formation of a search committee and ultimately the hiring of a new Executive Director. I can share with you some of what the Search Committee was looking for: a results-oriented leader with a shared, innovative vision, who will expand and enhance the resources BISG provides. Len Vlahos, former COO of the American Booksellers Association, brings those qualities to the position as well as a wealth of experience in the book industry, and we are excited to welcome him to the organization! Len’s first day as Executive Director will be September 12, 2011.

Be on the lookout for a number of upcoming projects that BISG is currently working on, including:

- A new policy paper on best practices for e-book identification
- A series of Rights and Royalty Reporting Pilot Programs to test a set of rights transactional messages designed to facilitate automated reporting of royalties
- An EPUB3 Pilot Working Group to consult on a Pilot Program from Kaplan Publishing to evaluate some of the enhanced features available in EPUB3
- The 2011 edition of the *BISAC Subject Headings*
- A set of standardized data elements and templates for reporting co-op eligible sales

It’s an exciting future that we’re all walking into, one that promises change and opportunity as well as challenges. BISG’s relevance has never been greater. This is a time of transformation and a time with a critical need for actionable data, analysis and analytics that can help us make informed decisions on the basis of real evidence.

On behalf of the Board of Directors and the staff, we would like to thank all of our members for your continued support. Thank you to each and every committee member for the work that you each do, which really is the backbone of BISG.

We look forward to unprecedented growth and involvement in the coming year from all aspects of the organization as we continue to develop new resources to further our mission. It is an exciting time to be a part of the book industry and BISG remains dedicated to creating the research, standards, policies and best practices that will foster and expand the future of publishing.

With Best Wishes,

Dominique Raccach
Publisher & CEO
Sourcebooks, Inc.



Kenneth Michaels
Executive VP & COO
Hachette Book Group



Standards and Best Practices

In early 2011, BISG undertook a review of its Committee structure with the intent of better aligning its Committee work, educational initiatives and research projects.

As a result, the decision was made to create a unified BISG Committee structure with a single Governing Council that merged what had been BISG Committees and what had been BISAC Committees. Traditionally, BISG Committees had focused more on business issues and had drawn executive-level members; BISAC Committees had focused more on technical issues and drawn members who were mainly from “back office” departments. Merging the two groups was a response to changes in our industry that have made standards and best practices more strategic. Executives from the top down need to be in tune with technical developments, and IT/IS managers and other technical experts need to understand business reasons and budgets. So in May 2011, the BISG and BISAC Committees were united under one BISG-branded umbrella. As the only exception, the BISG Committee focusing on Subject Codes will continue to use the BISAC label for our well-known industry-wide standard.



The work of BISG Committees was then examined in the context of BISG’s “Virtuous Circle,” with its three independent but closely related arms:

- Standards and Best Practices, involving Committee work, best practices and support for industry standards
- Education and Events, involving events, Webcasts, selected publications and general educational outreach
- Research, involving research projects and resulting publications, white papers and online research tools

The new BISG Governing Council is charged with coordinating Committee work and ensuring that the work of all Committees meshes with BISG strategy, educational initiatives and research. The Council is composed of Committee Chairs, Chairs of active Working Groups and BISG staff. In effect, it replaces the BISAC Executive Committee. The Council will meet five times per calendar year, and Wendell Lotz of Ingram Content Group will be its Chair. A summary report from each BISG Committee follows.

Committee Chair Reports

Content Structure Committee

Chair: Bill Kasdorf, Apex CoVantage

The Content Structure Committee evolved from the *Content Structure Working Group* within the Digital Content Committee. The BISG Governing Council agreed that the Working Group should supersede the Digital Content Committee because its name more accurately reflected the most recent activities within the Committee and because of BISG's desire not to separate digital and print concerns.

The Committee has been largely focused on best practices surrounding content structure and asset management, with a three-fold mandate to:

- Establish best practices for storage and interchange of digital content throughout the life cycle of book content.
- Establish a knowledge base for content models and use of those content models.
- Explore the current state of content formats and interchange standards.

Work was completed on surveying the content structure landscape, with a small subgroup of participants documenting and categorizing existing industry models for tagging and storing digital content. Next steps for the Committee are to develop a modular set of briefs or best practices for using the available models, and to provide additional information on specific topics that reflect industry pain points, such as handling fonts or graphics in EPUB and optimizing XML workflows.

The Committee was on hiatus for the last six months of fiscal year 2010–2011, but will re-launch in the fall of 2011. Jabin White of Ithaka stepped down in June 2011 as Chair of the Committee; the position was subsequently filled by Bill Kasdorf of Apex CoVantage.

EDI Committee

Chair: Doug Minett, *The Bookshelf*

BISG's Supply Chain EDI (SCEDI) Committee was renamed the EDI Committee to better represent today's book industry, which has become less of a "chain" and more of a conceptual "network." The main Committee itself did not meet in fiscal year 2010–2011, but its *Sales Reporting Working Group* was very active throughout the year.

Sales Reporting Working Group

Chaired by Francis Cave of EDItEUR, the EDI Committee's *Sales Reporting Working Group* was charged with developing best practices surrounding system-to-system sales and tax reporting for digital and print products for both agency and wholesale sales models. Throughout July and August of 2010, the Working Group developed a set of common data elements needed for reporting sales, along with usage notes

and examples, and completed similar data elements for reporting tax payments. The data elements for both sales and tax reporting were presented in both flat file (Excel) and XML formats.

In September 2010, the sales reporting data elements were tested by a select group of companies (Baker & Taylor, Lightning Source, OverDrive, RoyaltyShare, Simon & Schuster and Taylor & Francis Group (UK)), which simulated the data interfacing and the send/receive process using the flat file format. Feedback resulting from the Pilot Program was incorporated, and the final data elements were circulated and approved by the full Working Group, the EDI Committee, the BISG membership and the BISG Board of Directors before being published in June 2011. The tax reporting elements were also included in the approval process, and were published at the same time.

Standardized Co-op Reporting Working Group

In June 2011, the *Standardized Co-op Reporting Working Group* was formed at the request of representatives from Simon & Schuster to develop data elements and an Excel template for reporting co-op sales between wholesalers and retailers/publishers. Work is well under way on the draft template, and the Working Group expects to pilot the data elements in the fall of 2011 and publish in Q1 2012.

Identification Committee

Co-Chairs: Laura Dawson, *Firebrand Technologies*, and Phil Madans, *Hachette Book Group*

The work of the Identification Committee in fiscal year 2010–2011 was largely centered in the *Identification of E-books Working Group*, chaired by Phil Madans of Hachette Book Group.

In the summer of 2010, continuing its objective to create a Policy Statement for the assignment of identifiers to digital products, the Working Group created a framework for a survey to be administered to a broad cross-section of supply chain partners. Michael Cairns of Information Media Partners was hired to conduct the survey created from the framework and present its findings to Working Group members.

The Working Group spent several sessions reviewing the survey findings and mapping the route an EPUB takes through the supply chain, from publisher to end-consumer, investigating all the possible touch points to determine where processes might be improved and where critical communication might be lacking. The Working Group benefited from wide-ranging participation from all sectors of the supply chain, including guest experts from the library and retail markets.

Over the summer months of 2011, a draft Policy Statement was drawn up and circulated to Working Group members for review and comment. The final document is expected to publish in September 2011.

Machine Readable Coding Committee

Chair: Tom Clarkson, *Cumberland Systems Review Group*

The Machine Readable Coding Committee concentrated during the past year on assembling information on mobile commerce, a practice spreading rapidly in the United States. Mobile commerce is made possible by the display on a poster or in a publication of a new form of bar code, one composed of a matrix of dots rather than vertical lines and spaces. A frequently seen example is the QR Code.

The objective of the Committee's work is to develop a source of reference information covering the field of mobile commerce as it relates to the book industry. Because innovation in the field is so rapid, the Committee will not publish a fixed document. Instead, it is developing modules of information on different aspects of the practice that will be posted in a new mobile commerce area on the BISG Website. This approach will permit more rapid dissemination of information, and it will lend itself to timely updating as advances justify. The modules can be incorporated in other formats as appropriate, including presentations, Webcasts, and even documents for specific purposes.

The first of the mobile commerce modules were made available to the industry in September 2011. These modules will provide an introduction to the practice, a description of the bar codes most frequently used and points to consider in the design of mobile devices and Internet applications for mobile commerce.

Manufacturing & Distribution Committee

Co-Chairs: Jim Lichtenberg, *Lightspeed, LLC*, and Roger Milroad, *John Wiley & Sons*

Another change coming out of BISG's unified Committee structure was the fusion of the Manufacturing Executives Interest Group (MEIG) and the Distribution Executives Interest Group (DEIG) into a single entity. The interest and concerns of manufacturing and distribution remain closely related, and it was felt that the two groups, along with additional publisher representation, would benefit from a forum to discuss the issues together.

The new Committee will launch in the fall of 2011, with work being focused largely within a new *Tag Insertion Standards Working Group*. This Working Group will address best practices and concerns surrounding piracy, RFID and other similar tagging schemes in the academic publishing world. Jim Lichtenberg of Lightspeed, LLC will serve as the Working Group's Chair.

Metadata Committee

Chair: Richard Stark, *Barnes & Noble*

The Metadata Committee completed its revisions to the *Product Metadata Best Practices for Data Recipients* in July 2010; it was circulated and approved by the BISG membership in August, and was approved by the BISG Board of Directors in September 2010. The document was updated to include,

among other things, recommendations for faster updating of critical data fields and guidance for providing more standardized and specific levels of service between data providers and recipients.

The Committee continued its work on the ONIX standard, providing changes and recommendations to EDItEUR on behalf of the U.S. book industry. The work mainly revolved around recommendations for enhanced e-book types and formats to be included in Code List Issue 13. Code List Issue 14 will be reviewed in the upcoming fiscal year.

The Committee also reviewed draft implementation guidelines developed by standards body EDItEUR for ONIX 3.0, and agreed that the documentation could be modified to form the basis for future Best Practices for ONIX 3.0.

Finally, the Committee was asked by the BISG office to engage with the GS1 Working Group developing the *GS1 Business Message Standard (BMS) Trade Item Extension for Books and Publications* to review the mapping of ONIX to the GDSN Global Data Dictionary. That work will be picked up in fiscal year 2011–2012.

Product Data Certification Program

BISG’s *Product Data Certification Program (PDCP)*, developed and maintained by representatives from the Metadata Committee, continued to attract new companies in fiscal year 2010–2011. Thirteen companies were certified or recertified during that time, including the first companies to earn PDCP Gold Certifications.



Gold Certified

- Johns Hopkins University Press
- Macmillan
- Nolo
- Princeton University Press
- Rutgers University Press
- Simon & Schuster

Silver Plus Certified

- Cambridge University Press
- Random House

Silver Certified

- Arcadia Press
- Brilliance Audio
- Hachette Book Group
- Tyndale House Publishers
- University Press of Kentucky

Bronze Certified

- John Wiley & Sons
- The RAND Corporation

Publications Committee

Chair: Judith Appelbaum, *Sensible Solutions*

The Publications Committee recently resumed its activities by working on the latest *Consumer Attitudes Toward E-Book Reading* report. Its mission remains ensuring that all BISG publications are produced in accordance with high professional standards.

Research Committee

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

The Research Committee focused much of its attention on the data modeling, collection and analysis leading up to a new statistical publication, *BookStats*, a joint undertaking of BISG and the Association of American Publishers (AAP). This highly anticipated publication represents the first time BISG and the AAP have joined forces to produce a single accounting of unit and dollar sales targeting print and digital formats as well as channel and category segments.

In addition, work continued with partners PubTrack™ Consumer and Beacon Hill Strategic Solutions on a new series of consumer surveys leading up to the publication of the first two summary reports for Volume Two of *Consumer Attitudes Toward E-Book Reading*. As with Volume One, BISG members and others had the option of purchasing Real-Time Reporting, which allowed users to access the raw data and customize reporting as they wanted.

In fiscal year 2010–2011, the Research Committee also launched a new series of surveys and reports designed to shed light on the ways in which students learn and instructors teach, titled *Student Attitudes Toward Content in Higher Education*. The surveys and research conducted on behalf of BISG by partners PubTrack™ Consumer and Beacon Hill Strategic Solutions are designed to help publishers and other industry players understand how students from for-profit, two- and four-year colleges choose to engage with course content. As with *Consumer Attitudes*, customers had the option to purchase Real-Time Reporting.

Rights Committee

Co-Chairs: Judith Appelbaum, *Sensible Solutions*, David Marlin, *MetaComet Systems*, and Emily Williams, *Publishers Lunch*

Focusing on new business opportunities and current pain points, the Rights Committee has:

1. Created a draft data definition, in partnership with EDItEUR, for reporting international rights royalty transactions; the data definition, which is also applicable to domestic rights royalty transactions, is the first step in creating a specification for a message for communicating rights data between systems.
2. Created a Rights Controlled Vocabulary that breaks rights deals into their basic components and aims to describe every useful and current manifestation of those components.
3. Conducted research on rights management systems sponsored by Copyright Clearing House (CCC) and executed by The Idea Logical Company, the BISG Rights Committee and CCC.

The full Rights Committee met in July 2011 to hear and discuss reports from the Working Groups responsible for these activities, which said in brief:

1. The *Beta Testing Working Group*, led by David Marlin, has developed rights transactional pilot programs to assess the challenges involved in enabling automated communication of rights information between proprietary rights management systems, and to build the foundation for standardized communication of such data by creating and testing messages for reporting domestic and international rights royalty payments using a controlled vocabulary.

BISG partnered with the international standards body EDItEUR to capitalize on and tie in with existing standards.

The programs stem from consensus among BISG members and among members of the BISG Rights Committee that the digital transformation of the publishing industry has created a business need for more efficient management of intellectual property rights, and a business need for a common language in which to conduct rights transactions.

Current pain points that need addressing include the cumbersome process of royalty reporting, which involves transmission of information in the form of nonstandard documents and is costly in terms of human data entry and error. Developing business opportunities in digital licensing would benefit from a system-to-system form of communication for transacting rights at scale.

Like all other BISG pilot programs, the Rights Committee pilot programs are open to BISG members and nonmembers alike, and the Committee is actively seeking participants. Companies interested in participating should contact Karen Forster, BISG Associate Director (karen@bisg.org).

Assuming success with the programs, BISG will be able to provide best practices for communicating rights transaction data.

2. The *Communication Working Group*, led by Emily Williams, has developed a Rights Controlled Vocabulary designed to offer a comprehensive and flexible model for describing any book rights deal that would be transacted in today's marketplace, while the Vocabulary remains open to adaptation as the marketplace changes.

In the interests of flexibility and compatibility, the Rights Controlled Vocabulary draws on standards that already exist where possible: the Territory and Language categories are drawn from ISO standards, and the Format category is mapped to correspond with ONIX for Books Product Form List 150. This keeps the Vocabulary grounded in standards already used in real-world transactions and should make it easier to use in preexisting systems.

The Rights Controlled Vocabulary is also meant to stand on its own as a plain language tool that can help traditional and new players in the book industry describe and define rights transactions. So that it will be as complete and robust as it can be, it will be tested both in the

pilot programs described above and in proprietary rights databases, and it has been released for review by professionals throughout the industry.

3. The BISG research on rights management, conducted by BISG, The Idea Logical Company and the Copyright Clearance Center, took the form of a telephone survey designed to gather information about the ability of current systems with respect to today's multiplying opportunities for licensing and permissions deals that are small one by one but may generate sizable revenue in the aggregate.

Publishers and vendors who responded to the survey reported that current rights systems are inadequate and that there is a clear need for a standardized rights vocabulary. But they also reported that rights concerns do not seem central for senior management.

Evaluating these results in the context of BISG's strategic plan, the Rights Committee noted that they support its work on standardized digital messages and a standardized vocabulary, and the Committee decided to monitor senior management's views of the need for improved rights management with an eye toward working to address further needs as they arise.

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 Headings* list and the accompanying *Merchandising Themes* and *Regional Themes* lists.

Ten regular monthly meetings were held with an average attendance of 12 individuals each representing major publishers, wholesalers and other data aggregators and retailers. This average attendance is slightly higher than that of the past three years.

The Committee released a proposal for the 2011 edition of the *Subject Headings* in August 2011. Revisions to the 2011 edition were completed in July 2011. The edition contains significant changes to five sections (Drama, Education, Literary Collections, Poetry and Political Science) and minor additions and literal changes to at least 10 additional sections. The proposal includes 87 new heading additions, 44 literal changes and one inactivation. If the proposal is accepted, the 2011 edition will be available in the early fall.

The Political Science section underwent the majority of the changes; 43% of the overall literal changes and 18% of the total additions were made to this section. For the purpose of more clearly defining the meaning of the heading, the Government tree was renamed American Government. A new tree was created for World Politics, having regional branches within it. This change allows users to more accurately and specifically classify their titles. The Political Freedom & Security tree was broken down, making the headings that were within that tree now easier to locate.

The Drama, Literary Collections and Poetry sections were expanded to allow more granular identification of a work's origin; for example, trees were created from the existing Asian and European headings. In the Poetry section, a Subjects & Themes tree was created so that users can specify what the poetry contained in the work is about when appropriate; this has been a much-requested addition over the years and will hopefully accommodate the needs of publishers.

In the Fiction section, the Committee looked at some new and emerging genres. Headings were added for Dystopian fiction, Mashups and Steampunk fiction. In addition, headings were created for specific religious and ethnic groups, including Amish & Mennonites, Asian Americans and Hispanics & Latinos. The latter additions were discussed and added based on requests from users in the industry.

It was acknowledged that the issue of dividing the Juvenile sections between Children and Young Adult is one that is brought to the committee several times every year. To address this issue, the Committee held a dedicated meeting on June 29, 2011 that was open to all of BISG's membership. During this meeting a number of possibilities for meeting this challenge were presented. Based on the feedback during the meeting and a subsequent survey circulated, the Committee took the position that the industry need for any major modifications to the Juvenile sections of the codes is not as pressing an issue as was suspected, and has decided to leave these sections as is. In the event that a business need with demonstrable benefits is identified and presented to the Committee, the topic will be revisited at a later date. The overall issue seems to be more related to misuse of the age range and grade range fields in publishers' data; BISG will look at preparing educational material to address these issues.

XBITS Committee

Chair: Diane Degener, *R.R. Donnelley*

The XBITS Committee, renamed from the Publisher/Manufacturer Committee to more accurately reflect the Committee's focus, conducted meetings in February, July and September of 2010 and March 2011. The Committee also conducted conference calls twice a month in between the meetings. The XBITS standard is an electronic, XML-based transactional standard for communication between publishers and manufacturers.

With the evolving digital print technology resulting in increasing orders for digitally printed books, work on new implementations between trading partners continued for almost all the XBITS transactions during the past year, including work on the purchase order (PO) and PO acknowledgment, shipping instructions, advance ship notice (ASN) and book specifications messages to support the digital workflow and metadata requirements.

Education and Events

As part of its ongoing commitment to provide educational and networking events and opportunities for members and the industry at large, BISG presented a record number of conferences and Webcasts in fiscal year 2010–2011. Several of them, such as the NEXT Conference and the Digital Show & Tell, offered brand new formats that received overwhelmingly positive responses from participants. BISG was also pleased to be able to present a four-part Webcast series on the importance of implementing good product metadata; the plan is to continue this type of themed programming throughout fiscal year 2011–2012.

BISG Events

2010 Annual Meeting of Members

Held September 24, 2010 at the Yale Club in NYC



More than 100 people came to BISG’s 2010 Annual Meeting of Members, which focused on how new media and technology are shaping the ways the book industry redefines and reconnects with consumers. As speakers covered a variety of topics—including changes in consumers’ perception of book content and how content can, should and will be purchased, accessed, used and shared—presentations showed how forward-thinking companies can build products, services and marketing campaigns that are sophisticated, creative and—above all—consumer-focused.

BISG’s Annual Meeting also provided BISG members with a luncheon and an excellent opportunity to mingle and network with their industry peers and colleagues.

Speakers:

Kelly Gallagher, *Vice President of Publishing Services, R.R. Bowker*

David Jolliffe, *Vice President, Cross Media Publishing Services at Pearson Canada*

Maureen McMahon, *President & Publisher, Kaplan Publishing*

David “Skip” Prichard, *President & Chief Executive Officer, Ingram Content Group*

Kate Wilson, *Founder, Nosy Crow*

Sponsors:

Diamond Sponsor: Sterling Commerce
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Ingram Content Group



NYC Digital Show & Tell

Held January 20, 2011 at Sotheby's Institute of Art in NYC

The first BISG Digital Show & Tell, based on a format developed by the E-Books, E-Book Readers, Digital Content and Digital Content Publishing LinkedIn group, gave attendees the chance to “speed date” projects related to e-books, e-readers, digital books and digital content.

Six demonstrators pitched their innovative digital projects to small groups for seven minutes, strictly timed. Once time was up, each demonstrator moved on to another group until all attendees had been pitched about all six projects. Then another six demonstrators went through the same process with their innovative digital products.

When all was said and done, attendees had “dated” 12 exciting new projects and voted for their favorites.

NYC Digital Show & Tell was supported by Sourcebooks and BISG.

Developing the 2020 Publishing Program: a NEXT Conference

Held March 31, 2011 at the Roosevelt Hotel in NYC



BISG offered its members and the industry another unique conference when it hosted its newest event titled Developing the 2020 Publishing Program: a NEXT Conference. Founded on the principle that when all participants are afforded the opportunity to contribute, everyone benefits, the program featured thought leadership from industry experts in an intimate and interactive setting.

Team leaders for the event came with a wide range of industry experience and knowledge. The leaders were: Michael Healy (Book Rights Registry), Bob Kasher (BookMasters), Ed Keating (Software & Information Industry Association (SIIA)), Barbara Kline Pope (The National Academies), Maureen McMahon (Kaplan Publishing), Steve Paxhia (Beacon Hill Strategic Solutions), Dominique Raccach (Sourcebooks), Fran Toolan (Firebrand Technologies) and Len Vlahos (American Booksellers Association (ABA)).

Attendees also heard a keynote address from Brian O’Leary, Principal of Magellan Media.

The half-day event was based on a conference format developed by Ann Michael of Delta Think and Michael Clarke of Clarke Publishing Group. Ann Michael and Michael Clarke also moderated the program.

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WiFi Sponsor: KiwiTech



Supporting Organizations: BookNet Canada, ECPA, IBPA, Publishing Perspectives, SIIA
Media Partner: *Publishers Weekly*

What College Students Think: MIP for Higher Ed Publishing

Held February 9, 2011 at the Yale Club in NYC

Building on its successful Making Information Pay brand, BISG hosted a half-day event aimed at higher education publishing executives titled What College Students Think: Making Information Pay for Higher Ed Publishing. Attendees learned from industry experts how new media impacts college students' acquisition of course materials, and they got a sneak peek at the findings of the first survey fielding of BISG's seminal attitudinal study *Student Attitudes Toward Content in Higher Education*.

Speakers:

Steve Paxhia, *President, Beacon Hill Strategic Solutions*
Kelly Gallagher, *Vice President of Publishing Services, R.R. Bowker*
Bob Reynolds, *Director, Product Design & Research, Xplana*
Mark Nelson, *Vice President, NACS Media Solutions*
Julie Traylor, *Chief of Planning & Research, NACS*
Jade Roth, *Vice President of Books & Digital Strategy, Barnes & Noble College Bookstores*
Neil Marquardt, *Director, 4LTR Press, a division of Cengage Learning*
Dean Florez, *President, 20 Million Minds*
Mitchell Weisberg, *Lecturer at Sawyer Business School of Suffolk University*

Sponsors:

Anchor Sponsor: Bowker PubTrack™ Consumer
Silver Sponsor: National Association of College Stores (NACS)



Supporting Organizations: AAUP, BookNet Canada



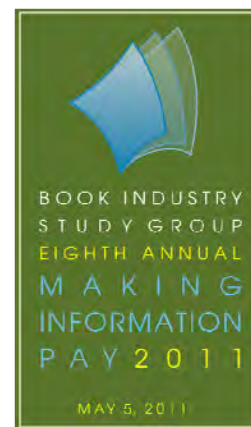
In the lead-up to MIP for Higher Ed Publishing, BISG hosted a Twitter hour, giving BISG followers and other interested parties the opportunity to chat live with Kelly Gallagher of R.R. Bowker about survey findings from BISG’s *Student Attitudes Toward Content in Higher Education* project.

Making Information Pay 2011

Held May 5, 2011 at the McGraw-Hill Auditorium in NYC

More than 200 people came to BISG’s flagship event, Making Information Pay (MIP), in 2011. Titled *Constructing the 21st Century Publishing Enterprise*, the program featured pragmatic, actionable presentations from industry leaders about responding to the waves of change affecting the book business. Among other things, attendees learned from the keynote presentation by BISG Vice-Chair Kenneth Michaels (Hachette Book Group) about the four essential business processes every company must master in order to serve consumers when, where and how they want to be served:

1. Product Development
2. Supply Management
3. Sales Tracking
4. Customer Loyalty



Speakers:

Tara Catogge, *Senior Vice President of Inbound Supply Chain, Levy Home Entertainment*

Bill Kasdorf, *Vice President, Apex CoVantage*

David Marlin, *President & Co-Founder, MetaComet Systems*

Ken Michaels, *EVP & COO, Hachette Book Group*

Heather Reid, *Director of Data Systems & Services, Copyright Clearance Center*

Brett Sandusky, *Director of Product Innovation, Kaplan Publishing*

Andrew Savikas, *CEO Safari Books Online & VP, Digital Initiatives, O’Reilly Media*

Mike Shatzkin, *Founder & CEO, The Idea Logical Company*

Madi Solomon, *Director of Content Standards, Pearson*

Sponsors:

Diamond Sponsor: Sterling Commerce

Platinum Sponsor: Copyright Clearance Center

Gold Sponsors: Bowker Publishing Services

RoyaltyShare

Xerox

Silver Sponsors: Firebrand Technologies

Ingram Content Group

Klopotek

Publishing Technology



BISG at BookExpo America (BEA) 2011

Held May 23 to May 26, 2011 at the Javits Center in NYC

BISG presented three educational sessions during the 2011 *BookExpo America*:

1. The E-Book Era Is Now: What does it look like from the consumer perspective? And what do we do about it?

This session featured new data from two ongoing BISG research projects:

Consumer Attitudes Toward E-Book Reading and *Student Attitudes Toward Content in Higher Education*.

Speakers: Angela Bole, *Deputy Executive Director, BISG*, and Kelly Gallagher, *Vice President of Publishing Services, R.R. Bowker*

2. AAP & BISG Present *BookStats*: New Data on the Size and Shape of the Book Industry

An introduction to the new joint AAP/BISG statistical report on the American book industry.

Speakers: Scott Lubeck, *Executive Director, BISG*; Tina Jordan, *Vice President, AAP*; Kelly Gallagher, *Vice President of Publisher Services, R.R. Bowker*; Dominique Raccah, *Publisher & CEO, Sourcebooks*; and Ken Michaels, *EVP & COO, Hachette Book Group*

3. An Open Meeting on E-Book Digital Rights Management, co-hosted by IDPF

During this one-hour open and informal discussion about digital rights management (DRM), BISG and IDPF worked with attendees to explore options for improving consumer experience with multichannel acquisition and cross-device consumption of e-books and other commercial digital publications.

Hosted by BISG and IDPF, and moderated by Angela Bole, *Deputy Executive Director, BISG*, and Bill McCoy, *Executive Director, IDPF*.



BISG & NISO at ALA Annual Conference 2011

Held on June 24, 2011, in New Orleans, LA

Building on four years of successful co-programming, BISG and NISO again co-hosted The Changing Standards Landscape during the 2011 American Library Association Annual Conference in New Orleans, LA.

This year's program explored how both the publishing and library communities are facing the new digital marketplace, focusing especially on the standards that underlie it. Instead of concentrating on differences and divergent needs, expert speakers highlighted the commonalities between publishing companies and libraries and what each group could learn from the other. The approach was designed to discover where common approaches could solve shared problems.

Speakers:

Peter Brantley, *Director of the Bookserver Project, Internet Archive*
Michael Cairns, *Managing Partner, Information Media Partners*
Phil Madans, *Director of Publishing Standards & Practice, Hachette Book Group*
Monique Sendze, *Information Technology Director, Douglas County Libraries*

Sponsor: CrossRef

BISG Webcasts

During fiscal year 2010–2011, BISG hosted 15 live Webcasts. Most were free for BISG members, and most were available for download after the live broadcast. The Webcasts were:

Understanding the Impact of Independent Publishers on the U.S. Book Market

Speakers: Florrie Binford Kichler, *IBPA*, and Jamie Carter, *Publisher Alley*
July 22, 2010

Between Hype and Hope: Design and Content Offerings for Tomorrow’s Reading Devices

Speaker: Ralph Ressman, *Information Architects*
In partnership with IDPF
September 2, 2010

Book Consumer Empowerment through Smart Phones

Speaker: Tom Clarkson, *Cumberland Systems Review Group*
September 16, 2010

Marketing “Books” in a Digital World

Speakers: Peter Milburn, *Wiley Global Finance*, and Rob Goodman, *Simon & Schuster*
Moderator: Jim Lichtenberg, *Lightspeed, LLC*
October 27, 2010

Facebook: Driving Traffic with Tips, Tactics & Applications for Publishers and Authors

Presented by BookExpo America, in partnership with BISG
December 7, 2010

The NEW BISAC Subject Headings List: Connecting Books to Readers

Speakers: Connie Harbison, *Baker & Taylor*, and Angela Bole, *BISG*
December 9, 2010

Digital Books: A New Chapter for Reader Privacy

Speaker: Nicole Ozer, *ACLU of Northern California*
January 27, 2011

Understanding Profitable New Business Dynamics for Publishers (Thanks to Digital Printing, and Beyond...)

Speakers: Kent Larson, *Bridgeport National Bindery*, and Joe Upton, *Malloy Incorporated*

Moderator: Jim Lichtenberg, *Lightspeed, LLC*

March 30, 2011

Selling in a Digital World: Promoting an Even Playing Field with On-sale Date Compliance

Speakers: Tom Clarkson, *Cumberland Systems Review Group*, Tom Stouras, *Macmillan*, and Mary McCarthy, *Ingram Content Group*.

May 19, 2011

Distribution in a Digital World

Speakers: Rick Joyce, *Perseus Books Group*, and Marcella Smith, *Marcella Smith Associates*

Moderator: Jim Lichtenberg, *Lightspeed, LLC*

June 1, 2011

Selling More Books with Best Practice in Metadata

A four-part Webcast series on metadata and its impact on today's book industry.

The four-part series included:

THE WHAT: Demystifying Product Metadata for Digital and Physical Books

Speakers: Laura Dawson, *Firebrand Technologies*, and Renee Register, *DataCurate*

June 8, 2011

THE HOW: Building Product Metadata for Digital and Physical Books

Speakers: Tom Richardson, *BookNet Canada*, and Richard Stark, *Barnes & Noble*

June 15, 2011

THE NEXT LEVEL: Enhanced Metadata for Digital and Physical Books

Speakers: Pat Payton, *R.R. Bowker*, and Richard Roberts, *OCLC*

June 22, 2011

PUTTING IT ALL TOGETHER: Implementing ONIX for Digital and Physical Books

Speakers: Rebecca Albani, *R.R. Bowker*, and Tom Richardson, *BookNet Canada*

June 29, 2011

BISG thanks Sally Dedecker of Sally Dedecker Enterprises for her help planning the series, recruiting speakers and moderating the programs. Individual Webcasts are available for download, as is the entire series.

BISG thanks the series sponsors — R.R. Bowker, OCLC and OnixEdit — and the series supporting organizations — IBPA, PubWest and SPAN.



Additional Events

BISG continued to maintain a high level of international visibility, with numerous speaking engagements and supporting organization roles throughout 2010–2011 at other industry shows and conferences, including:

Publishing Business Virtual Conference & Expo
September 16, 2010

eBooks: Libraries at the Tipping Point
September 29, 2010

Tools of Change at Frankfurt Book Fair
October 5, 2010

International Supply Chain Seminar at Frankfurt
October 5, 2010

Library Binding Institute 2010 Fall Conference
October 24, 2010 to October 25, 2010

ANELE 2010
October 25, 2010 to October 27, 2010

Gilbane Content Publishing & Technology
November 30, 2010 to December 2, 2010

Digital Book World Conference & Expo
January 24, 2011 to January 26, 2011

PSP Publishing on the Move Conference
February 2, 2011

O'Reilly Tools of Change for Publishing
February 14, 2011 to February 16, 2011

BookNet Canada Technology Forum
March 24, 2011

SIIA NetGain 2011 Conference
May 17, 2011, to May 18, 2011

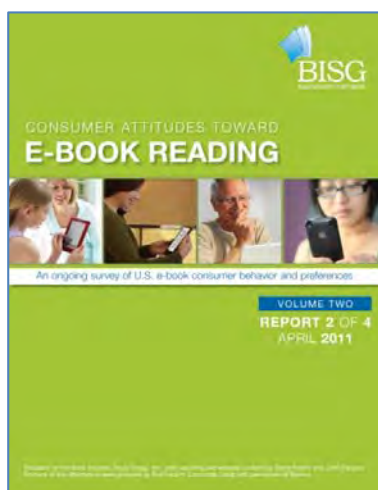
IBPA Publishing University
May 22, 2011 to May 23, 2011

IDPF Digital Book 2011
May 23, 2011 to May 24, 2011

Research

In fiscal year 2010–2011, BISG successfully completed several research projects and publications under the auspices of the Research Committee, the Rights Committee and the Identification Committee.

Consumer Attitudes Toward E-Book Reading



BISG continued its ongoing survey project with PubTrack™ Consumer to capture book consumers' interests in and preferences for digital content, and the factors that influence their reading habits and purchasing decisions. The third and final summary report for Volume One of *Consumer Attitudes Toward E-Book Reading* was published in August 2010.

The most recent survey data and analyses pertain to Volume Two of the survey. The first two reports in this cycle's four scheduled reports were published during fiscal year 2010-2011.

To maintain continuity with the Volume One, Volume Two survey participants were asked the same core set of questions, such as:

- When did you first begin acquiring e-books?
- Where do you typically acquire e-books?
- Which genre(s) are you more likely to read as an e-book rather than a print book?
- What device do you now use most frequently to read e-books?
- How likely are you to buy a dedicated e-reader for yourself or to give as a gift in the next two months?

BISG offered survey results and statistical analysis as a series of PDF reports, and as a dynamic, browser-based toolset, Real-Time Reporting, for accessing and customizing the data.

Sponsors (Volume One):

Champion Sponsor:	Baker & Taylor	Friend Sponsors:	CERLALC
Supporter Sponsor:	Hachette Book Group		iPublish Central
	Sony Electronics		Macmillan
Contributor Sponsors:	Barnes & Noble		Pearson
	HarperCollins Publishers		Publishing Technology
	OCLC		
	Random House		



Sponsors (Volume Two):

- Champion Sponsor: Direct Brands
- Supporter Sponsor: Baker & Taylor
- Contributor Sponsors: Barnes & Noble.com
Harlequin
HarperCollins Publishers
Levy Home Entertainment
- Friends Sponsors: Pearson
Publishing Technology



Student Attitudes Toward Content in Higher Education



The ways students learn and instructors teach are undergoing a radical shift, and the role of the traditional print “textbook” as the foundational tool for instruction is changing along with the traditional publishing model. To help shed light on these changes, BISG engaged with PubTrack™ Consumer to develop a baseline survey for tracking the rapid changes already under way in the higher education marketplace. The survey findings and analysis of them were published as *Student Attitudes Toward Content in Higher Education*.

Twice over the course of 12 months (in November 2010 and February 2011), BISG surveyed students enrolled in for-profit, two- and four-year colleges to better understand how they choose to engage with course content. The report features:

- Online tools to modify and sort data, enabling access to a Web-based tool set displaying the data derived from responses.
- Hyperlinked content sources, providing access to links referencing additional content, footnotes and citations.
- Multiple data points, with the survey conducted twice over a 12-month period, each time resulting in new up-to-date drillable data and a fresh PDF Summary Report.

Sponsors:

- Champion Sponsor: Xplana™
- Contributor Sponsors: Baker & Taylor
Budgetext®
CourseSmart
Follett Higher Education Group
Kno™
Pearson



Rights Management Research

In early 2011, BISG’s Rights Committee, the Copyright Clearance Center (CCC) and The Idea Logical Company conducted research on the current state of rights management systems.

Nine publishers and six rights-systems vendors were informally polled to ascertain the current rights management landscape and to determine, based on those findings, whether additional research was warranted. The anecdotal information collected indicated that while rights activities were increasing within publishing houses and rights were being defined and sold in new and creative ways, most executives did not consider rights a strategic priority.

Many of the details provided by survey respondents validated the efforts of the two Rights Committee Working Groups (see the Committee Chair Reports, Rights Committee, on page 6 of this report). Although there was no quantifiable ROI for continuing the research, the Rights Committee was charged with keeping an eye on “rights urgency” as it continues to prepare tools that would assist the industry once rights management becomes a strategic priority.

Identification of E-Books

An important piece of research was undertaken within BISG’s Identification Committee through its *Identification of E-Books Working Group*. In the spring of 2010, this Working Group was created to research and gather data around the practice of assigning identifiers to digital book products throughout the U.S. supply chain. Its specific mandate was to gather a true picture of how the U.S. book supply chain is handling ISBN assignments and then formulate best practice recommendations based on its findings.

The first step was to survey the existing landscape. BISG and the Working Group engaged Michael Cairns of Information Media Partners for this step, and he interviewed 70 representatives from across the book industry about their current practices surrounding the use of ISBN for different digital formats. His interviews revealed that there were no standards surrounding the assignment of identifiers to digital products, and that unorthodox practices and workarounds were prevalent across the supply chain.

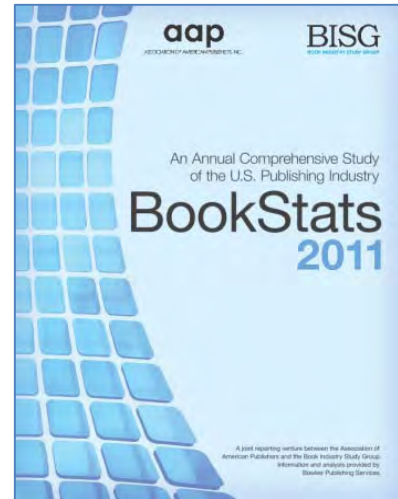
Armed with this anecdotal information, the Working Group turned its attention to the development of a policy paper recommending best practices for the identification of digital products; this document will publish in fall 2011.

BookStats

BookStats, a revolutionary statistical report, stems from the first-ever collaboration between BISG and the Association of American Publishers (AAP) on a joint accounting of unit and dollar sales in print and digital formats segmented by format, category and channel.

Teaming up with R.R. Bowker and Management Practice, Inc., BISG and AAP conceived of a new data model in late 2010, and collected data from close to 2,000 publishers and other industry resources throughout the spring of 2011.

BookStats 2011 provides three years of data (for 2008, 2009 and 2010) as it tracks publishers' net sales and units in a variety of ways, such as:



- Format tracking, including physical (hardcover, paperback, audio and mass market), nonphysical (e-book, enhanced e-books, downloadable audio, paid mobile apps, Internet-based products and services) and bundles.
- Category tracking, including trade fiction and nonfiction, juvenile (early readers, middle grade and young adult), religious, higher education, K–12, professional and scholarly books.
- Channel tracking, including physical retail (chains, independents, and mass and specialty retailers), online retail, institutional (libraries and schools), direct to consumer, jobbers and wholesalers, book fairs, and export.

BookStats also provides an estimated sizing of the industry, with a defined methodology for supplementing reported data with data from partners in the book industry, including retailers and associations, among others.

BISG is thrilled to have partnered with AAP on this industry tool for measuring the size and breadth of the book industry, and to be offering it both as a PDF Annual Report and as a dynamic Online Data Dashboard.

In addition, BISG and AAP both appreciate the efforts of the many people who contributed to the success of this project. They include: Kenneth Michaels, Executive Vice President & COO, Hachette Book Group; Dominique Raccah, President & CEO, Sourcebooks; Joe Gonnella, Vice President, Adult Trade Merchandising, Barnes & Noble, Inc.; Kelly Gallagher, Vice President, Publisher Services, R.R. Bowker; Richard Barclay, Partner, Management Practice, Inc.; Len Vlahos, COO, American Booksellers Association; Mark Kuyper, President, Evangelical Book Publishers Association; Kent Watson, Executive Director, Publishers Association of the West; Florrie Binford Kichler, President, IBPA, the Independent Book Publishers Association; Michael Cader, Founder, Publishers Marketplace; Mike Shatzkin, Founder, IdeaLogical Company; Jim Milliot, Co-Editorial Director, Publishers Weekly; Steve Paxhia, Beacon Digital Strategies; Geoffrey Bock, Bock & Company and John Parsons, Byte Media Strategies.

Financials, Operations and Governance

Financial Results

Fiscal year 2010–2011 was forecast to be an investment year, with a budget that emphasized additional investments in staff, research and new educational programs and events, including *BookStats*, the Identification of E-Books research project and BISG’s inaugural NEXT Conference. Along with the planned investment, BISG was unable to collect as many sponsorship dollars as projected earlier in the year, contributing to a deficit for the fiscal year of \$196K versus a budgeted shortfall of \$124K.

Summary Results

Book Industry Study Group, Inc	
Statements of Cash Receipts & Disbursements	
Year ended June 30, 2011	US\$
Cash receipts:	
Membership dues	\$606,563
Publications, programs and events	\$269,881
Other receipts	\$21,755
Total	<u>\$898,199</u>
Cash disbursements:	
Publications, programs and events	\$237,710
BISAC expenses	\$8,500
Office services and operating expenses	\$848,185
Total	<u>\$1,094,395</u>
(Deficiency) Excess of cash receipts over disbursements	(\$196,196)

Membership

BISG was thrilled to welcome 36 new members during fiscal year 2010–2011. Once again demonstrating the organization’s appeal to a wide variety of companies across all industry sectors, these new members included Disney Worldwide Publishing, EBSCO Publishing, TATA Consultancy Services, Sterling Commerce, SBS Worldwide and BookExpo America.

Among the 28 members that did not renew membership last year, several libraries, publishers and individuals indicated that they were feeling the impact of recessionary forces.

For a complete list of companies that joined BISG during the past fiscal year, see Appendix 1 of this document.

Staffing and Administration

BISG Office Staff

Toward the end of the fiscal year, BISG Executive Director Scott Lubeck left in pursuit of other interests; a search committee was immediately formed within BISG’s Executive Committee. Sara Raffel, longtime BISG Office Manager, departed earlier in the year to pursue a career in academia.

Editor’s Note: Subsequently, Len Vlahos, formerly COO of the American Booksellers Association, was appointed Executive Director. Mr. Vlahos officially starts his new role at BISG on September 12, 2011.

Infrastructure and Website

The BISG office continued to expand and enhance its Web presence, creating customized sites for selected events and ensuring frequent updates on BISG and industry news, committee initiatives and new publications and events. The Website was also updated to reflect the new unified BISG committee structure (for more about this, see page 1).

No major investments in infrastructure were needed in FY 2010–2011, and the plans from the preceding fiscal year to move forward with a new online association management system were put on hold, pending investigation of alternative solutions for optimizing the member experience and interface.

Social Media

BISG continued to maintain and bolster its online presence through Twitter and LinkedIn, promoting its activities and interacting with BISG members and the book industry at large. In addition, the BISG Bulletin was reinstated as a monthly publication emailed to members, informing them of BISG and industry activities.

Board of Directors

The following were elected to the BISG Board of Directors for a three-year term at the BISG Annual Meeting of Members in September 2010.

- Gary Aiello, *SVP Publishing Services, R.R. Bowker*
- Sally Dedecker, *President, Sally Dedecker Enterprises*
- Joe D’Onofrio, *VP Supply Chain, Simon & Schuster*
- John Fine, *Director, Author & Publisher Relations, Amazon.com*
- Ted Hill, *President, THA Consulting*
- Dan Johnson, *SVP, IS Development, Baker & Taylor*
- Tina Jordan, *VP, Association of American Publishers (AAP)*
- George Lossius, *Group CEO, Publishing Technology*
- Rick Schwartz, *CIO, HarperCollins Publishers*

BISG Officers elected for a two-year term during the 2010 Annual Meeting of Members were:

- **Co-Chair:** Dominique Raccah, *Publisher & CEO, Sourcebooks*
- **Co-Chair:** Andrew Weber, *SVP, Operations & Technology, Random House*
- **Vice-Chair:** Ken Michaels, *EVP & COO, Hachette Book Group*
- **Treasurer:** Deborah Wiley, *SVP, John Wiley & Sons*
- **Secretary:** Judith Appelbaum, *Managing Director, Sensible Solutions*

(Subsequent to this meeting, Andrew Weber resigned as Co-Chair when he left Random House, and Deborah Wiley resigned as Treasurer when she retired from John Wiley & Sons; her post was filled by George Tattersfield of Ingram Content Group.)

In the spring of 2010, the Board of Directors formed a special advisory group, the Board Composition Committee, chaired by Judith Appelbaum, to review and make recommendations regarding the size and composition of the BISG Board of Directors.

The Committee concentrated on enhancing inclusiveness while preserving and fostering functionality. Its recommendations, which were presented to and approved by the Board in late May 2010, were:

- Expand the Board under Article VI—Section 2 of the by-laws.
- Add representatives of unrepresented or underrepresented sectors.
- Continue to have industry associations represent their constituencies directly on the Board instead of establishing a separate association group.
- Use criteria expressed in or implied by the Board “job description” to make decisions about appointing and reappointing specific Board members instead of routinely reelecting Board members and routinely replacing a departing Board member with a representative of the same organization.
- Ask BISG’s Executive Director to formulate a plan to ensure that the Board will continue to be appropriately inclusive.

As a result of these recommendations, a number of new Board seats were filled, and a number of replacements were made throughout fiscal year 2010–2011. Here is an annotated list:

- John Bohman, *VP, Sales & Customer Operations, Random House*
(replaced Andrew Weber on the Board)

- Ken Brooks, *SVP, Global Production & Manufacturing Services, Cengage Learning*
(new appointment to the board)
- Tara Catogge, *SVP, Inbound Supply Chain, Levy Home Entertainment*
(new appointment to the board)
- Terry Downes, *VP, Publishing Operations, Disney Publishing Worldwide*
(new appointment to the board)
- Lyle Girandola, *VP, Publishing Finance, The McGraw-Hill Companies*
(replaced Frank Lawton on the board)
- Helene Green, *VP, Business Information & Data Operations, Simon & Schuster*
(replaced Joe D’Onofrio on the board)
- David McCree, *SVP, Sales, Book & Directory Group, R.R. Donnelley*
(replaced Ronald Weir on the board)
- Maureen McMahan, *President & Publisher, Kaplan Publishing*
(new appointment to the board)
- George Stanley, *VP, Director of Sales & Product Information, Professional & Trade Group, John Wiley & Sons*
(replaced Deborah Wiley on the board)
- Fran Toolan, *Founder & Chief Igniter, Firebrand Technologies*
(new appointment to board)

Budget

BISG members can request a copy of the fiscal year 2011–2012 BISG budget by contacting the BISG office at info@bisg.org.

Appendices

Appendix 1: New BISG Members in Fiscal Year 2010–2011

Anythink Libraries	International Monetary Fund	Ridan Publishing
BookExpo America	James J. Hill Reference Library	Robert Sinclair
Bryan W. Robertson	Joseph Publishing Services LLC	SATO America ISD Division
CBE Publications	Kathy Weiss	SBS Worldwide
Chegg	Kiwa International	Seth Gershel
Connect for Education	Loyola Press	Sideris Courseware
Delta Think	NewGen	Smart Guard LLC
Disney Publishing Worldwide	Open Book Systems	Sterling Commerce
EBSCO Publishing	Pace University Library	TATA Consultancy Services
Ellora's Cave	Parkstone International	Vantage Press
GiantChair	Q&A Media Resources	William Sadlier
Gill & Macmillan	Reading, Etc.	Zinio LLC

Appendix 2: BISG Board of Directors

Chair:

Dominique Raccah
 Publisher & CEO, Sourcebooks

Vice-Chair:

Kenneth Michaels
 Executive Vice President & COO
 Hachette Book Group

Secretary:

Judith Appelbaum
 Managing Director, Sensible Solutions

Treasurer:

George Tattersfield
 VP, Merchandising, Ingram Content Group

Other Executive Committee Members:

Sally Dedecker
 President, Sally Dedecker Enterprises

Joseph Gonnella
 VP, Adult Trade Merchandising, Barnes & Noble

Other Directors

Gary Aiello
 SVP, Publishing Services, R.R. Bowker

Charles Benante
 VP, Technology Sourcing Office
 Pearson Technology

John Bohman VP, Sales and Customer Operations Random House	Mark Kuyper President & CEO Evangelical Christian Publishers Association
Ken Brooks SVP, Global Production and Manufacturing Services, Cengage Learning	James Lichtenberg President, Lightspeed, LLC
Gary W. Brusseau VP of Sales, Books, Quad/Graphics	George Lossius Group CEO, Publishing Technology
Tara Catogge SVP, Inbound Supply Chain Levy Home Entertainment	Dave McCree SVP, Sales, Book & Directory Group R.R. Donnelley
Terry Downes VP, Publishing Operations Disney Publishing Worldwide	Maureen McMahan President and Publisher, Kaplan Publishing
Noah Genner President & CEO, BookNet Canada	Jonathan Nowell President, Nielsen Book
Lyle Girandola VP, Publishing Finance, The McGraw-Hill Companies	Andrew Savikas VP, Digital Initiatives, O'Reilly Media CEO, Safari Books Online
Peter Givler Executive Director Association of American University Presses	Rick Schwartz CIO, HarperCollins Publishers
Helene Green VP, Business Information & Data Operations, Simon & Schuster	George Stanley VP, Director of Sales & Product Information (Professional and Trade Group), John Wiley & Sons
Ted Hill President, THA Consulting	Fran Toolan, Founder & Chief Igniter Firebrand Technologies
Dan Johnson SVP, IS Development, Baker & Taylor	Tom Turvey Director, Google Book Search Partnerships, Google
Tina Jordan VP, Association of American Publishers	Len Vlahos COO, American Booksellers Association
Florrie Binford Kichler President Independent Book Publishers Association	

Appendix 3: Current BISG Committees

BISG Governing Council

Chair: Wendell Lotz, Ingram Content Group

bisac_chair@bisg.org

Content Structure

Chair: Bill Kasdorf, Apex CoVantage

digitalstandards_chair@bisg.org

EDI Committee

Chair: Doug Minett, The Bookshelf

bisac_scedi@bisg.org

Identification Committee

Co-Chair: Laura Dawson, Firebrand

Technologies

Co-Chair: Phil Madans, Hachette Book Group

bisac_identification@bisg.org

Machine Readable Coding Committee

Chair: Tom Clarkson, Cumberland Systems

Review Group (CSRG)

bisac_mrc@bisg.org

Manufacturing & Distribution Executives

Interest Group

Co-Chair: Roger Milroad, John Wiley & Sons

Co-Chair: Jim Lichtenberg, Lightspeed, LLC

deig_chair@bisg.org

Metadata Committee

Chair: Richard Stark, Barnes & Noble

bisac_metadata@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

Rights Committee

Co-Chair: Judith Appelbaum, Sensible Solutions

Co-Chair: David Marlin, MetaComet Systems

Co-Chair: Emily Williams, Publishers Lunch

bisac_rights@bisg.org

Subject Codes Committee

Chair: Connie Harbison, Baker & Taylor

bisac_subjectcodes@bisg.org

XBITS Committee

Chair: Diane Degener, R.R. Donnelley

bisac_pubman@bisg.org

Appendix 4: Sponsors of BISG Work

BISG gratefully acknowledges the support of the following companies and organizations, which contributed to specific publications, programs and events in fiscal year 2010–2011.

Advantage Computing Systems	Additional Sponsor, NEXT Conference 2011
Baker & Taylor	Champion Sponsor, <i>Consumer Attitudes Toward E-Book Reading, Volume One</i> Supporter Sponsor, <i>Consumer Attitudes Toward E-Book Reading, Volume Two</i> Contributor Sponsor, <i>Student Attitudes Toward Content in Higher Education, Volume One</i>
Barnes & Noble	Contributor Sponsor, <i>Consumer Attitudes Toward E-Book Reading, Volume One</i>
Barnes & Noble.com	Contributor Sponsor, <i>Consumer Attitudes Toward E-Book Reading, Volume Two</i>
Bert Davis Executive Search	Silver Sponsor, Annual Meeting of Members 2010
Bowker Publishing Services	Gold Sponsor, Making Information Pay 2011
Bowker PubTrack™ Consumer Budgetext®	Anchor Sponsor, Making Information Pay for Higher Ed 2011 Contributor Sponsor, <i>Student Attitudes Toward Content in Higher Education, Volume One</i>
censhare	Gold Sponsor, NEXT Conference 2011
CERLALC	Friend Sponsor, <i>Consumer Attitudes Toward E-Book Reading, Volume One</i>
Copyright Clearance Center	Platinum Sponsor, Making Information Pay 2011
CourseSmart	Contributor Sponsor, <i>Student Attitudes Toward Content in Higher Education, Volume One</i>
CrossRef	Sponsor, The Changing Standards Landscape, ALA 2011
Direct Brands	Champion Sponsor, <i>Consumer Attitudes Toward E-Book Reading, Volume Two</i>
Firebrand Technologies	Silver Sponsor, Making Information Pay 2011
Follett Higher Education Group	Contributor Sponsor, <i>Student Attitudes Toward Content in Higher Education, Volume One</i>
Hachette Book Group	Supporter Sponsor, <i>Consumer Attitudes Toward E-Book Reading, Volume One</i>
Harlequin	Contributor Sponsor, <i>Consumer Attitudes Toward E-Book Reading, Volume Two</i>

HarperCollins Publishers	Contributor Sponsor, <i>Consumer Attitudes Toward E-Book Reading, Volume One</i> Contributor Sponsor, <i>Consumer Attitudes Toward E-Book Reading, Volume Two</i>
Ingram Content Group	Silver Sponsor, Annual Meeting of Members 2010 Silver Sponsor, Making Information Pay 2011 Sponsor, 2010 Annual Report
iPublish Central	Friend Sponsor, <i>Consumer Attitudes Toward E-Book Reading, Volume One</i>
KiwiTech	WiFi Sponsor, NEXT Conference 2011
Klopotek	Silver Sponsor, Making Information Pay 2011
Kno™	Contributor Sponsor, <i>Student Attitudes Toward Content in Higher Education, Volume One</i>
Levy Home Entertainment	Contributor Sponsor, <i>Consumer Attitudes Toward E-Book Reading, Volume Two</i>
Macmillan	Friend Sponsor, <i>Consumer Attitudes Toward E-Book Reading, Volume One</i>
National Association of College Stores	Silver Sponsor, Making Information Pay for Higher Ed 2011
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About BISG



The Book Industry Study Group (BISG) is a not-for-profit research and technology standards organization whose members come from every sector of the publishing community. BISG is a forum for managing change and enabling interaction among publishers, booksellers, librarians, wholesalers, manufacturers, authors and suppliers. For more information, visit www.bisg.org.

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