**Biodiversity Heritage Library Quarterly Report**

**August 1, 2012 – October 31, 2012**

**First Quarter, Sixth Project Year**

1. **Introduction/Executive Summary**

*This quarter, the Scanning and Digitizing Component continued to increase the volume of its scanned literature, which now totals 108,881 volumes consisting of 39,723,328* ***pages as of October 31, 2012.***  *Permissions for digitizing 248 publications within copyright, mostly significant serial runs, have been obtained from several publishers.*

*On September 27-28, 2012, thirty-one staff members representing all 14 BHL member institutions convened at the Ernst Mayr Library of the Museum of Comparative Zoology at Harvard University for the 2012 BHL Staff and Technical Meeting. The meeting was divided into separate Staff and Technical tracks, with only those sessions relevant to all staff combined. Combined sessions included Program and Technical updates, as well as a discussion of BHL Projects and Initiatives, which was a chance for staff to identify high-impact projects to incorporate into a 2-year workplan for BHL. Staff sessions included a Program Management Update; brainstorming requirements for a BHL-Awareness Program; a Collections Analysis, Scope, and Prioritization discussion; a Blog brainstorming session; and discussions about BHL's mission statement and goals. The Technical sessions discussed providing article-level access in BHL; replicating and synchronizing BHL content globally; the NEH Art of Life project status; BHL's boutique digitization workflow management tool Macaw; Full-text searching; and OCR improvements.*

*Last quarter, we announced that BHL’s founding Technical Director, Chris Freeland, accepted a new position as Senior Director of University Academic Computing at Washington University. On August 23, 2012, the BHL Steering Committee unanimously voted to appoint William Ulate as BHL’s new Technical Director. Ulate previously served as BHL’s Global Coordinator, a capacity he will maintain alongside his duties as technical director. The BHL Technical Advisory Group, formed last quarter, with appointments occurring this quarter, will advise Ulate on technical development issues.*

*In other project news, BHL released its eleventh iTunes U Collection, celebrating Shark Week; released the third pan-BHL Quarterly Report; and developed a BHL publicity plan structured around week-long campaigns devoted to the intersection between BHL content, pop culture topics and member institution events. Work to merge the BHL-Australia and BHL-US/UK portals is underway, combining the Australian interface with the US functionality. The new website will launch in early January. Plans are also in place to incorporate Citebank, BHL’s article repository, into BHL, with a target date of June, 2013. Reporting on Citebank metrics will be suspended until the integration is completed. Finally, staff have begun requirements gathering to develop a web-based, remote application of the workflow management software, Macaw, which allows user to upload content scanned outside the Internet Archive digitization workflow to BHL.*

*In financial news, to date BHL has raised approximately $109,000 in dues and donations for project sustainability. These funds supplement the BHL Federal allocation (amounting to $150,000 for FY13), remaining Lounsbery grant funds (which will close November, 2012), and SIL Seidel endowment funds (amounting to $350,936 for FY13) to support BHL’s operations. Finally, this quarter SIL BHL staff submitted a proposal to the Smithsonian Latino Grants Initiative, for approximately $40,000, to support the digitization of Spanish language materials and the development of an online exhibition devoted to Latin American natural history.*

1. **Technical Report**
2. ***Operations***
3. *Management or staff transitions*

*Last quarter, we announced that BHL’s founding Technical Director, Chris Freeland, accepted a new position as Senior Director of University Academic Computing at Washington University. By maintaining his status as a Research Associate at MOBOT, Freeland will remain the PI on BHL-related grants, including the EOL MacArthur subaward to MOBOT and the NEH Grant supporting work related to BHL images.*

*On August 23, 2012, the BHL Steering Committee unanimously voted to appoint William Ulate as BHL’s new Technical Director. Ulate previously served as BHL’s Global Coordinator, a capacity he will maintain alongside his duties as technical director.*

*Last quarter, we announced the formation of the BHL Technical Advisory Group, comprised of developers, programmers, and library systems staff at various BHL institutions, which will provide technical guidance to BHL’s Technical Director. This quarter the appointments to this group have been announced, and include:*

 *Joe de Veer, Museum of Comparative Zoology, Erst Mayr Library, Harvard University*

 *Chris Freeland, Washington University*

 *Jenna Nolt, United States Geological Survey*

 *John Mignault, New York Botanical Garden*

 *Joel Richard, Smithsonian Libraries*

 *Keri Thompson, Smithsonian Libraries*

 *Frances Webb, Cornell University*

*Also this quarter, the United States Geological Survey officially joined BHL at the Steering Committee level. This level of membership allows institutions to vote on BHL spending plans and entitles them to the use of central BHL funds for digitization. It requires $10,000 in annual dues.*

*On September 27-28, 2012, the 2012 BHL Staff and Technical Meeting occurred at the Ernst Mayr Library of the Museum of Comparative Zoology at Harvard University in Cambridge, MA. The meeting served as an opportunity for technical and workflow staff to convene and discuss project management and technical development issues. Key topics included revamping BHL’s mission, goals, and a discussion of BHL projects and initiatives. See “Meetings Conferences and Workshops” for more information.*

*BHL Secretariat staff have begun work developing a BHL Workplan, which will include a collections policy, permissions plan, communications and outreach plan, marketing and branding plan, and a financial sustainability plan. The Secretariat hopes to complete a draft of the workplan, for presentation to the Institutional Council, by the end of February, 2013.*

*BHL Program Manager Grace Costantino developed a BHL publicity campaign plan, in effect through Dec., 2012. See “Public Outreach” for more information on the publicity campaigns.*

1. *Operations coordination*

*In compliance with the new BHL governance structure, regular conference calls for the BHL Executive and Steering Committees continue, as well as the maintenance of listservs for both of these groups and the Institutional Council. Calls discuss operational activities and project coordination. Wiki pages for the management and support of activities performed within these groups are also maintained. Executive Committee calls occur on a weekly basis, while Steering Committee calls occur the fourth Thursday of every month.*

*Monthly BHL Staff Calls also continue, hosted by BHL Collections Coordinator, Bianca Crowley. These calls discuss project and workflow coordination among BHL’s partner institutions.*

*BHL Program Manager, Grace Costantino, continues to manage an extensive BHL calendar system to assist in project, conference, and editorial coordination. It is available to all staff members, and staff are encouraged to contribute events to the calendar.*

1. *Staff activities (covered below under multiple other categories)*
2. ***Strategic direction***
3. *Progress toward milestones – (see attached metrics spreadsheet)*
4. *Subsequent quarter goals and metrics*

*The milestone “Leverage crowd-sourcing” with the metric of “number of articles deposited” (in Citebank) is under review at present. The publishers and Authors Guild lawsuit against Google has altered the intellectual property landscape and previous counsel about “safe harbor” protection for user uploaded content has been revisited and reviewed. BHL staff at the Missouri Botanical Garden and the Smithsonian ran a small pilot with an individual who did the due diligence for obtaining permissions for individual articles, scanning them, and sending for ingestion into Citebank. While the pilot was successful in the sense that the content was loaded into CiteBank and the permissions were given where necessary, the approach is not scalable.*

*Furthermore, we are entering a new phase in Citebank development (See “Tool Design and Requirement Analysis” for more information). We are working to merge Citebank into the BHL portal. All Citebank functionality, and the delivery of article content, will be available via the BHL portal. A rough target date for this implementation is June, 2013. Due to these transitions, we are suspending Citebank metrics reporting until the application is available in BHL, at which time we will determine the appropriate statistics to gather. For more information on Citebank development and our plans for the project, see “Citebank 1 Pager.”*

*Additionally, legal implications have influenced BHL to abandon the idea of Citebank as a “safe harbor” model. While we plan to continue to allow users to upload content to Citebank, and eventually via the BHL portal, the current plan is that these uploads will be added to a queue to be vetted for copyright appropriateness. The workload implications of this decision must be further explored, and may result in the upload functionality being a “hidden” feature known only to “power” users and not widely publicized.*

*Finally, due to difficulties obtaining the precise number of pages re-hosted by partner projects, this metric has been adjusted to the number of items re-hosted by partner projects, i.e. global partners. The YR 5 Goal for items rehosted by partner projects was calculated by taking the previous page goal and dividing by the average number of pages in a book, 300, resulting in a YR 5 Goal of 116,700 items. Due to delays in the rewrite process, the YR 5 global rehosting goal has not been achieved, thus, the YR 5 Goal remains in place as the YR 6 Goal.*

1. ***Improving internationalization***
2. *International outreach and activities*

*At the end of October, 2012, the BHL-Australia project officially came to an end. As BHL-Australia has their own portal, with an extremely friendly user interface that was particularly praised during usability testing in October, 2011, but will no longer be able to maintain that portal, it was decided that the BHL-US/UK and BHL-Australian portals would be merged into one website. The merge will incorporate the aesthetically-pleasing interface for the Australian portal with the usability-test preferred functionality and tools of the BHL-US/UK portal. See “Tool Design and Requirement Analysis” for more information.*

*While further technical development will not continue, BHL-Australia will continue to contribute digitized texts to the BHL project via the Macaw software developed by Smithsonian Libraries web developer Joel Richard. The software allows users to upload content digitized outside of the Internet Archive workflow for ingestion into Internet Archive, from which the content can then be incorporated into the BHL collection. To date, BHL-Australia has contributed 52,407 pages to BHL via this method.*

*While the BHL-Europe project officially came to end in April, 2012, development continues on the online exhibition platform entitled “Biodiversity Library Exhibitions.” This platform allows staff to create mini websites devoted to specific themes, incorporating a variety of content types, including images, scanned literature, factoids, trivia, and stories. BHL staff Grace Costantino and Gilbert Borrego have been in communications with the Exhibitions’ developer, Jiri Frank, about installing an application of the platform for BHL-US/UK. We plan to use this platform as a promotional and educational tool for BHL, and hope to release our first exhibition in late spring, 2013.*

*BHL-Europe staff hosted a workshop demonstrating the Exhibition platform at the 2012 TDWG conference in Beijing, China. The workshop was attended by representatives from BHL-Europe, Australia, China and the US.*

*Last quarter, we reported that, as a result of the 2012 Global BHL Meeting, development would continue on the Global Reference Index to Biodiversity, or the GRIB, which will serve as a workflow management tool that can be utilized by all global BHL partners. BHL-US/UK agreed to help contribute to the tool’s development, and in August, 2012, we submitted metadata and functionality requirements for the GRIB to BHL-Europe.*

*BHL-Brazil continues to contribute citations to BHL’s article repository, Citebank. These citations link back to full-text PDFs available on the BHL-Brazil website. To date, 7,122 citations from BHL-Brazil have been added to Citebank.*

*To date, BHL’s global partners have contributed 345,147 pages to the BHL-US/UK portal. BHL’s global partners include BHL-Australia, BHL-Europe, and BHL-China.*

1. *Agreements/MOUs*

*BHL has entered into discussions with the California Digital Library and the Library of Congress regarding consortium membership. The Library of Congress is expected to join the BHL officially in the coming months.*

1. ***Increasing content***

*This quarter, the Scanning and Digitizing Component continued to increase the volume of its scanned literature, which now totals 108,881 volumes consisting of 39,723,328* ***pages as of October 31, 2012.***  *Permissions for digitizing 248 publications within copyright, mostly significant serial runs, have been obtained from several publishers.*

1. *Content contributions*
2. *Content related activities*

*Contribution to the BHL Flickr account continues, with 48,060 images currently added to the collection. The Flickr account pulls out the amazing natural history illustrations from BHL books and serves them up to users in an easy, approachable manner. It continues to be one of the most popular services offered by BHL, and has instigated a great deal of discussion about providing better access to BHL illustrations.*

*In February, 2012, BHL launched the Biodiversity Heritage Library on iTunes U, consisting of collections of select BHL material centered on such themes as “Extinct Species,” “Rarest of the Rare,” “Charles Darwin’s Library,” and “Theodore Roosevelt.” New iTunes U collections are released on a quarterly basis. This quarter, BHL released its 11th iTunes U collection, dedicated to Shark Week (See “Public Outreach” for more information). BHL outreach staff also further promoted the Theodore Roosevelt iTunes U collection during a week-long publicity campaign in collaboration with the American Museum of Natural History. The campaign celebrated the reopening of the Roosevelt Memorial at AMNH, which BHL highlighted through a blog post, tweets, and Facebook posts, which incorporated the iTunes U collection, the week of the opening.*

1. ***Improving the user experience***

*We continue to collect and promptly respond to user-submitted feedback for BHL. This feedback includes questions, comments, alerts about problems with BHL content, requests for items to be scanned and added to the collection, and, happily, praise from our users. All feedback (called ‘tickets’) is collected via an issue tracking system (called Gemini), and users receive answers to their feedback within 24 hours of receipt. This feedback is directly used to improve content and services on BHL. To date, we’ve received over 4,689 user-submitted tickets. For more feedback statistics, see attached “Gemini Report.”*

*In September, 2012, BHL also began officially gathering statistics on the number of pages manually paginated for the BHL project. Though minimal pagination is asserted at the time of scanning by the scanner, this metadata is usually confined to general page numbers and an indication of the title page. In order to designate issues, articles, and images and plates within BHL scanned content, staff must manually apply these augmentations. From Sept.-October, 2012, BHL staff manually paginated 70,013 pages.*

1. *Tool design and requirement analysis*

*As part of the recent NEH grant received by MOBOT to conduct work related to BHL images, a template for uploading images from BHL’s Flickr account to WikiCommons, for inclusion in Wikipedia, is under development. A test batch of Flickr images was selected to experiment with the uploading process. MOBOT staff also released a proposed schema for organizing metadata associated with images. This schema was released to the public for review on August 30, 2012, and collection of feedback continues.*

*As stated in “International Outreach and Activities,” the decision was made to merge the BHL-Australia and the BHL-US/UK portals, combining the user-friendly design of the BHL-Au site with the functionality of the BHL-US/UK site. From August 6-24, 2012, Australian and US staff collaborated to assemble requirements for the merged website and craft design options for review by staff. From August 24-September 14, these designs were released to staff and feedback was gathered. By September 21, all feedback suggestions were incorporated and the final design and requirements for the merged site were approved.*

*During the month of October, BHL-Au developer Simon Sherrin travelled to St. Louis to work with US developer Mike Lichtenberg at MOBOT to perform the actual merge of the websites. At the end of October, Joel Richard of the Smithsonian Libraries and John Mignault of the New York Botanical Garden also traveled to St. Louis to assist with the final stages of the merge.*

*Most of the integration has been completed in the BHL-US/UK beta site, though Mike Lichtenberg is working on some final implementations. In mid-November, the beta site will be released to BHL staff for testing. This testing will continue until early December, and improvements and corrections will be implemented in December. We plan to release the new website in early January. The BHL-US/UK URL will of course remain the same, but the BHL-Au site will redirect to the BHL-US/UK site.*

*BHL outreach staff have developed a plan for announcing the release of the new website to the public. These will include three blog posts, one published late November, another mid December, and a third on the day of the launch, a press release on the day of the launch, and weekly tweets and Facebook posts, beginning in early December, counting down to the release. Staff are also working on User Instructional materials to guide users through the changes; these materials will become public on the day of the launch.*

*At the Global BHL Meeting in June, 2012, technical staff discussed the critical aspect of global content synchronization and replication. At that meeting, it was decided that Internet Archive (IA) would be used as the common repository within which all program nodes would deposit their content for replication globally. However, further discussions at the 2012 BHL Staff and Technical Meeting (See “Meetings, Conferences and Workshops” for more information) revealed extensive complications with this course of action, largely due to the lack of proper check sums in the Internet Archive. It was proposed that the full extent of IA BHL content be copied to new servers at the Smithsonian, and that global replication and synchronization would occur via these servers and not through IA.*

*Staff at Smithsonian Libraries have begun gathering requirements and have set aside funds for the creation of a complete copy of BHL content on Smithsonian servers, which we hope to have in place by the end of CY13. After this, discussions about global replication and synchronization will continue.*

*As mentioned previously, SIL BHL staff have developed a software called Macaw that allows users to upload content scanned outside of the Internet Archive workflow into IA so that it can be ingested into BHL. Currently, users must install a unique instance of the software on their own servers to operate it. Joel Richard of Smithsonian Libraries has begun gathering requirements for developing a remote installation of the software, probably on Smithsonian servers, that will allow users to login from anywhere in the world and upload content through a web interface run through the remote installation. A definite timeline for the implementation of such an instance is still being discussed.*

*At the BHL-Africa meeting in June, 2012, the need to develop a BHL mobile application and the desire to pursue “BHL in a Box” initiatives were articulated. As many native Africans do not have access to computers, but do have mobile devices with internet capabilities, reaching an African audience may depend upon mobile applications. Furthermore, as internet connectivity is sparse throughout much of sub-Saharan Africa, the development of “BHL in a Box,” which would provide access to BHL content without requiring an internet connection, may prove critical to the success of the project. At the 2012 BHL Staff and Technical Meeting, it was decided that while this initiative is a priority, but we do not have the staff to support such an endeavor. Thus, it was named as a priority funding project, for which BHL will actively pursue a grant to support the work.*

*BHL-US/UK submitted metadata and functionality requirements for the GRIB to BHL-Europe, which may eventually serve as the global workflow and de-duplication tool for BHL. (See “International Outreach and Activities” for more information)*

*Currently, access to articles for BHL is limited to Citebank, a separate article repository (See “Strategic Direction” for more information). It has been decided that Citebank will be merged into BHL, which will mean that users can access article-level content through BHL and upload articles directly to BHL. Staff hope to have Citebank merged into BHL by June, 2013. The capacity to support article-level access to content has already been implemented into the BHL backend, but will not be released to the public until the launch of the new interface (See “Tool Implementation” for more information). As mentioned in “Strategic Direction,” as a result of these changes, we are suspending Citebank metrics gathering until further notice. Find out more about our plans for Citebank in “Citebank 1 Pager.”*

*As supporting a “safe harbor” model for BHL is no longer practical, it has been decided that articles uploaded by users will be added to a queue to be vetted for copyright appropriateness. The workload implications of this decision must be further explored, and may result in the upload functionality being a “hidden” feature known only to “power” users and not widely publicized.*

1. *Tool implementation*

*“Segment” functionality has been implemented on BHL’s backend. This functionality allows staff to break BHL content up by articles and provide article-level access to users. “Segments” will be released in conjunction with the new interface in early January.*

1. ***Engaging the wider scientific community***

i. *Scientific outreach*

*In order to engage with our scientific community, and understand how they use BHL and what they need from BHL, we continue to publish a monthly blog series entitled “BHL and Our Users,” in which we feature a different user in each post and interview them about their work and how they use BHL to support that work. Though not exclusively featuring scientific users, a majority of the user base interviewed are scientists.*

*BHL supported an official presence at the Ecological Society of American and IAMSLIC, both in August, 2012. These conferences cater to the scientific community. See “Meetings, Conferences, and Workshops” for more information.*

1. *Partnerships and projects*

*In an agreement with the Digital Public Library of America (DPLA), BHL content is one of the first key data sets being used as a test bed for the DPLA portal.*

*Progress on the Field Notebooks project, funded by an IMLS grant, continues, with digitization of field notebooks and specimens underway at many partners, and soon to be underway at others. Field notebooks scanned by BHL consortium members are currently being ingested into BHL. BHL will co-host a booth at the ALA Midwinter Conference in January, 2013, with the Field Notebooks Project.*

*BHL staff at Cornell University and New York Botanical Garden have engaged in a project to digitize seed catalogs held in botanical collections around the country. The catalogs digitized by BHL member institutions may ultimately be ingested into the BHL corpus.*

1. *Letters of support (see* ***Testimonials*** *at end)*
2. ***Engaging education and citizen science communities***
3. *Public outreach*

*Social media activities continue in full swing. BHL is active on the following platforms: Facebook, Twitter, Flickr, Pinterest, and the blog.*

*Twitter: To date, we have 2,064 followers on Twitter*

*Facebook: To date, we have 3,625 Page “Likes” on our Facebook account*

*Flickr: To date, we’ve added 48,060 images to our Flickr account*

*Pinterest: To date, we have 1,899 images and 15 collections on Pinterest*

*Blog: This quarter, we’ve had 8,286 visits to our blog, and our regular series “Book of the Week” and “BHL and Our Users” continue to be very popular*

*For more social media metrics, please see “BHL Q4 FY12 Quarterly Report”: http://biodivlib.wikispaces.com/file/view/BHL+Q4+FY12+Quarterly+Report.pdf*

*Program Manager, Grace Costantino, has continued to collaborate with colleagues at the National Museum of Natural History, submitting weekly tweets linking to BHL content for publication on the @NMNH twitter account. She has also coordinated with EOL staff to include highlights of BHL content in the museum’s print calendar. These collaborations will continue in the future, with plans to branch out to additional BHL partner institutions.*

*BHL also continues to contribute tagged Flickr images to the EOL image pool for ingestion into EOL species pages. To date, 6,498 images have been added to the EOL Flickr images pool.*

*In July, BHL launched the third pan-BHL quarterly report, covering the months of July-September, 2012. See “BHL Q4 FY12 Quarterly Report”: http://biodivlib.wikispaces.com/file/view/BHL+Q4+FY12+Quarterly+Report.pdf*

*BHL continues to launch its quarterly newsletter, which provides project highlights via email subscription. To date, over 350 people have subscribed to the newsletter, and both the Spring and Summer newsletters have been distributed. The Fall newsletter will be released in November, 2012.*

*For the week of August 12-18, BHL hosted a Shark Week campaign in celebration of Discovery Channel’s famous week-long event. The campaign consisted of Facebook posts, Tweets, a blog post, Flickr images, and an iTunes U collection dedicated to sharks.*

*We measured the success of our campaign in relation to how much traffic our various outreach activities drove to BHL during the Shark Week campaign, as compared with the average traffic per week for the two months previous to the campaign, as well as how our iTunes U collection performed in relation to other iTunes U collections. We saw a 125% increase in traffic to BHL originating from Twitter, a 46% increase in traffic to BHL from Facebook, and a 50% increase in traffic to BHL from Flickr. We also saw 314% more downloads, 446% more subscribers, and 357% more browses on our Shark Week iTunes U collection than a single iTunes U collection receives on average. Only two of our outreach platforms underperformed during this campaign. We saw a 20% decrease in traffic to BHL from the blog and a 56% decrease in traffic to BHL from Pinterest. However, general views in Pinterest during Shark Week increased, indicating that, though Shark Week drove more traffic to our Pinterest account, people did not convert that traffic to visits to BHL.*

*The marked success of this campaign influenced staff to explore other opportunities to structure outreach activities around popular events equivalent to Shark Week. Staff have organized several campaigns between now and the New Year, including an American Trails campaign celebrating the opening of the new exhibit at the National Zoo, the aforementioned Roosevelt campaign, a Halloween campaign, an election campaign centered around Presidential Pets, a Catesby campaign in coordination with the Catesby tercentennial, an Institutional Holiday campaign, celebrating holiday exhibitions at BHL member institutions, and a Mayan End of the World campaign, highlighting Mayan biodiversity in the wake of the end of the Mayan calendar. After the New Year, the success of these campaigns will be analyzed and decisions about future outreach strategies will be discussed.*

1. *Learning tools*

*As mentioned previously, BHL-Europe staff have developed the Biodiversity Library Exhibition tool, an application that allows staff to build virtual exhibitions around specific themes. This tool allows staff to curate collections of BHL materials and augment these resources with related images, stories, and factoids. Built on a Drupal platform, BHL-E released this platform to the larger BHL community in conjunction with the workshop held at the 2012 TDWG conference in Beijing. BHL-US/UK staff intensely communicated with BHL-Europe staff regarding the utilization of this tool for BHL-US/UK, particularly as an educational outreach opportunity. Staff hope to develop our first exhibition by late Spring, 2013.*

*In October, Martin Kalfatovic and Grace Costantino met with Jill Vermillion of Apple, who works to coordinate activities related to iTunes U and new iBook opportunities. The trio discussed developing supplemental iBooks for teachers incorporating BHL content around educational themes. Vermillion will travel to D.C. in December to demonstrate the iAuthor tool used to create these books, and BHL staff will explore was to leverage this opportunity for educational outreach.*

*In September, BHL staff met with EOL educational staff to gather tips for how to create user instructional materials, particularly in relation to the Flickr tagging events mentioned in past reports. BHL staff are in discussions with a video editor to create a promotional video introducing the tagging activities and are exploring requirements and options for further instructional and promotional materials to supplement tagging activities.*

1. *Education modules*
2. ***Improving EOL’s impact, engagement and reputation***
3. *Publications and websites (See final page of Report)*
4. *Presentations (See final page of Report)*
5. *Meetings, workshops, and conferences*

*On September 27-28, 2012, thirty-one staff members representing all 14 BHL member institutions convened at the Ernst Mayr Library at the Museum of Comparative Zoology at Harvard University for the 2012 BHL Staff and Technical Meeting. As a combined meeting, it brought together not only those that manage the digitization workflow at each member institution, but also those that work to keep BHL's technical infrastructure running smoothly and constantly improving.*

*To maximize the 16 hours available for discussions, the meeting was divided into separate Staff and Technical tracks, with only those sessions relevant to all staff combined. Combined sessions included Program and Technical updates, as well as a discussion of BHL Projects and Initiatives, which was a chance for staff to identify high-impact projects to incorporate into a 2-year workplan for BHL. Staff sessions included a Program Management Update; brainstorming requirements for a BHL-Awareness Program; a Collections Analysis, Scope, and Prioritization discussion; a Blog brainstorming session; and discussions about BHL's mission statement and goals. The Technical sessions discussed providing article-level access in BHL; replicating and synchronizing BHL content globally; the NEH Art of Life project status; BHL's boutique digitization workflow management tool Macaw; Full-text searching; and OCR improvements.*

*Major milestones at the meeting included preliminary formation of a new mission statement for BHL, as well as the revision of BHL’s goals, and a strategy for the maintenance and prioritization of a single list of BHL projects and initiatives. BHL staff further discussed the new mission statement on the October staff call, and a Mission Statement group was formed to finalize a staff suggestion for a BHL mission statement. This statement will be finally discussed in November by staff and submitted to the BHL Institutional Council for final review by early December. BHL hopes to release this new mission statement in conjunction with the release of the new user interface for BHL. Following the mission statement, staff and leadership will use this work to inform the revision of BHL’s goals and prioritize BHL’s projects and initiatives. All of this work will inform the previously-mentioned BHL workplan.*

*In August, 2012, BHL’s Executive Committee Vice-Chair, Connie Rinaldo of Harvard, MCZ, represented the Encyclopedia of Life and the Biodiversity Heritage Library at an exhibitor’s booth at the Ecological Society of America annual meeting in Portland, Oregon. The theme for the 2012 annual meeting was: Life on Earth: Preserving, Utilizing and Sustaining our Ecosystems. Also that month, Rinaldo presented BHL at the 2012 IAMSLIC (International Association of Aquatic and Marine Science Libraries and Information Centers) conference in Anchorage, Alaska. Both venues were excellent opportunities to promote the BHL projects, particularly to the scientific communities.*

*On October 24-25, BHL Program Director Martin Kalfatovic and BHL Program Manager Grace Costantino attended the Internet Archive Leaders Forum in San Francisco, CA. The meeting, attended by 23 representatives from projects partnering with Internet Archive, provided attendees with a chance to showcase their projects, discuss their collaborations with IA, and nurture ideas associated with eBooks. Each participant also had a chance to talk about eBooks in the context of their own project, and elaborate on their requirements for such a program. Kalfatovic and Costantino discussed BHL’s eBook situation and articulated that, if eBooks are going to work for the science community, they must be openly available, users must be able to "mine" them for the data required, and name finding services and linked data options must be supported.*

*While in San Francisco, Costantino and Kalfatovic also met with representatives from Flickr and Apple (as previously mentioned in “Educational Tools”). The Flickr meeting was a chance to highlight BHL’s activities in Flickr and outline some of the challenges we face, including limitations with bulk upload tools (which affect our ability to efficiently upload our tagged images to the EOL Flickr pool), image rights display, outreach within the Flickr platform, and conversion to Flickr Commons. BHL hopes to migrate to Flickr Commons, and exert a CC-0 license on all of our images, in the near future. Furthermore, Flickr expressed a desire to collaborate with BHL staff on promoting BHL Flickr activities, for which Costantino has already supplied material.*

1. ***Achieving financial sustainability***
2. *Fundraising efforts*

*The “Donate to BHL” feature on the BHL portal has raised $9,010.24 in donations to date, which are processed through the Smithsonian Libraries' financial system. The allocation of these funds is decided by the BHL Steering Committee.*

*To date, BHL has raised $100,000 via Steering Committee Dues for future development. These funds are annual dues contributed by those BHL member institutions that wish to be a part of the BHL Steering Committee, allowing them to vote on project decisions and fund allocations. BHL Secretariat staff will send out invoices for the FY13 dues by mid-November, to be paid by Dec. 31, 2012.*

*The BHL Steering Committee approved the spending budget for the BHL Dues. Spending categories include Technical Director salary support, hardware and software funds, application of DOIs, server storage support, Internet Archive scanning, travel and meeting costs, and outreach materials. Grace Costantino sends out monthly spending reports for Dues and Donations money.*

*SIL received its allocation from the Seidell endowment for FY13, which amounts to $350,936, and supports a majority of SIL BHL staff – 5 staff in total. SIL staff still await the FY13 Federal Allocation for BHL, which will amount to $150,000.*

*BHL staff are working with development staff at SIL to organize an online giving campaign for BHL for December, 2012. The campaign will include email appeals as well as tweets, blog posts and Facebook posts encouraging users to support BHL.*

*In September, 2012, spending for the JRS foundation grant ended. This grant, totaling $47,243.15, funded a meeting in Cape Town, South Africa, June 14-15, 2012, aimed at developing a BHL for Sub-Saharan Africa. Spending and narrative reports are due to the foundation Nov. 30, 2012.*

*This quarter SIL BHL staff submitted a proposal to the Smithsonian Latino Grants Initiative, for approximately $40,000, to support the digitization of Spanish language materials and the development of an online exhibition devoted to Latin American natural history. Staff expect to hear within a few months’ time whether they will receive the funds.*

1. **Financial Report**
2. ***Budget explanation***

*The subawards for scanning at the New York Botanical Garden, the American Museum of Natural History, the Marine Biological Laboratory, and the California Academy of Sciences have been completed and closed out. The subaward for the Missouri Botanical Garden is current, and an extension until May 31, 2013, has been received. All invoices submitted to date have been paid or are being processed for payment.*

1. ***Financial report (attached)***
2. **Appendices**
3. ***Metrics spreadsheet (attached)***
4. ***Other***

*The number of EOL species pages with links to BHL texts: 1,243,115. Number of EOL species pages that have no other data except the BHL links: 3,953. Number of BHL text pages that link to EOL species pages: 13,497,742.*

 Q4, FY12 BHL Quarterly Report: http://biodivlib.wikispaces.com/file/view/BHL+Q4+FY12+Quarterly+Report.pdf

Gemini August-October 2012 – attached

BHL Website Analytics - Attached

1. **Testimonials (for “Letters of Support”)**
* **Wednesday, October 31, 2012**
	+ Acknowledgements in paper by Field Museum Curator Rüdiger Bieler, "The work was greatly facilitated by Field Museum’s outstanding library resources and various on-line providers, first and foremost among them the Biodiversity Heritage Library (BHL) project."
	+ <http://www.mapress.com/zootaxa/2012/f/zt03511p080.pdf> - Page 67
* **Tuesday, October 30, 2012**
	+ From Fernando Martin, via Gemini [mailto: fernando@deltanallorca.com]
	+ Fantastic job. I thank you very much the opportunity of getting access to all this materials. Don’t give up!!! Best regards, F.Martín
* **Thursday, October 25, 2012**
	+ Blog post featuring BHL:
	+ <http://birdaz.com/blog/2012/10/25/another-other-peoples-bird-book/>
* **Thursday, October 25, 2012**
	+ From Amelia Hutchins, via gmail [mailto: meemshutchins@gmail.com]
	+ Just looked at your site again and thought I was able to parse the conditions but I had to read it over several times. I wanted to thank you for providing a wonderful service. by Allowing access to public domain images that are supposed to be "public" is crucial to promoting future creativity. As an artist, I am so grateful to have so much inspiration at my fingertips. What you all are doing is invaluable!
* **Monday, October 22, 2012**
	+ From @stampedinblind, via Twitter
	+ @BioDivLibrary makes my job so much easier.
* **Friday, October 19, 2012**
	+ From Chris Thompson, posted to the Taxacom listserv, October 18, 2012
	+ As a loyal subscriber and reader who has a current subscription until 04 Feb

2016 , I am very upset that I will no longer be able to sit in my chair and read a real magazine. AND who are hurt the most is the older people who no longer can understand / use computer / online interfaces, etc.

BUT as for PRESERVATION, I do not worry.

In biology / taxonomy, we now, for example, have the Biodiversity Heritage Library program. So, today regardless of who and where you are, if you have access to the internet you can get copies of old biodiversity literature (the pre-1923 copyright barrier).

So, while I have a large personal library of old books and reprints, TODAY I can find an article faster by doing a query online at my computer than looking among my library.

As for long-term preservation, already the library community has worked together to develop a network of servers who promise to maintain these original digital files.

* **Tuesday, October 16, 2012**
	+ From Dan Johnson, sent via email to Tina Muracco [mailto: dan.johnson@uleth.ca]
	+ Thank you for posting old books and images in the Biodiversity Heritage Library. I have made a small personal donation to the fund. I read this material, as an entomologist, and plan to show it in my biogeography class. I am interested in teaching resources for instructors. There is so much information that it is hard to find my way around it. Congratulations on this excellent resource. I hope it continues to grow.
* **Wednesday, October 3, 2012**
	+ Shout-out to BHL in article by Denis Jacob Machado
	+ (In regard to publication written by Machado) This work would not be possible without the Biodiversity Heritage Library (www.biodiversitylibrary.org), from where we obtained most of the 19th and early 20th century publications cited herein.
* **Thursday, September 27, 2012**
	+ From Chris Sharpe, via Gemini [mailto: sharpebirder@gmail.com]
	+ Fantastic service: easy, accurate & very prompt! Thank you!
* **Tuesday, September 25, 2012**
	+ From Steve Sifers, via Gemini [mailto: smsifers@earthlink.net]
	+ Got the link for the download i requested. i don't know how you do it, but i am very impressed. thank you
* **Friday, September 21, 2012**
	+ From @PlantTeaching, via Twitter
	+ Biodiversity Heritage Library has quickly become a favorite - awesome pictures and stories [#FF](http://hootsuite.com/dashboard) @[BioDivLibrary](http://hootsuite.com/dashboard) [sco.lt/8RPMDh](http://t.co/a7Jt9DEn)
* **Monday, Septmeber 17, 2012**
	+ From isandervanbeek, via Flickr
	+ You have a very beautiful collection, i just wanted to give you my compliments. Your images are beautiful. I came across by looking for flyfishing photo's to use for a mockup for a website design. (To use for a presentation for a flyfishing store in Holland). Now I write this anyway, do you mind me asking if your images are also for commercial use? I'm not sure if I can use them but I'm keeping a library with stock images. Just in case! Anyway, thanks for sharing it with the world!
* **Monday, September 10, 2012**
	+ From Timothy Casey, via gmail [mailto:timothy.casey@fieldcraft.eu]
	+ I've just downloaded Ser. 1 Vol. 68, thank you very much.

I also noticed Ser. 4 Vol. 40 missing and also Ser 1 Vol. 32. However, I don't know if Vol. 32 is missing as an aberration due to the changeover from the previous triannual publication to the subsequent biannual publication...?

Anyway, thank you for putting together this magnificent collection. I have questions, I'll be researching, concerning the period in which John Leslie was active and I am certainly looking forward to exploring the 19th to 20th century transition in the sciences, thanks to all the new volumes you've added. It was also an immense help that your electronic editions are so well catalogued. It is for this reason that BHL is usually my first port of call when seeking reading material in English.

* **Friday, September 7, 2012**
	+ From Lourdes Chamorro, via Facebook
	+ BHL makes my research so much easier! I absolutely love it. A million times thank you!
* **Tuesday, September 4, 2012**
	+ From Jude Wrup, via Facebook
	+ This is fabulous, thank you
* **Thursday, August 30, 2012**
	+ From Roland Houart, via gmail [mailto: roland.houart@gmail.com]
	+ Dear Grace Costantino, Many, many thanks for your answer! And thanks for such a treasure of references.
* **Wednesday, August 29, 2012**
	+ From @lubar, via Twitter
	+ @[Museocat](http://hootsuite.com/dashboard) @[pilsks](http://hootsuite.com/dashboard) @[BioDivLibrary](http://hootsuite.com/dashboard) Good suggestion! Thank you! @[BioDivLibrary](http://hootsuite.com/dashboard) is a wonderful project!
* **Wednesday, August 29, 2012**
	+ From Hélio Rosa, via Gemini [mailto: rosademiranda@usp.br]
	+ Many thanks of your pdf's service
* **Friday, August 24, 2012**
	+ From Timothy Colman, via Facebook
	+ What a treasure chest you have put together. Cool art. I make interp posters @ Good Nature Publishing<http://www.goodnaturepublishing.com/> and love the inspiring art you have posted. Plus who doesn't like saying simultaneous hermaphrodite?
* **Wednesday, August 22, 2012**
	+ From Sabine Brauckmann, via gmail [mailto: sabine.brauckmann@gmail.com]
	+ Without Biodiversity Library I couldn't do my research.
* **Wednesday, August 22, 2012**
	+ From Joe Shaw, via Gemini [mailto: shawjoej@gmail.com]
	+ Hi, I thought you might like to know how I use your library. I have a Website devoted to opuntiads (mostly the genus Opuntia). I try to find the original citation and link it to each species description. For example, see: <http://opuntiads.com/O/opuntia-species/opuntia-d-f/opuntia-engelmannii/> The second paragraph refers the reader to the original descrition. It has helped to provide a scholarly feel to my Website. Cordially, Joe Shaw, PhD
* **Monday, August 13, 2012**
	+ From Pat LaFollette, via gmail
	+ How can one rate BHL when there is nothing to compare it to? It is unique. BHL's holdings of pre-1923 molluscan and biological journals may well be the most complete in the world with the possible exception of NHM London. Your holdings of paleontological journals is less complete, as are monographs. Many of the journal runs are broken, which can be annoying if the paper one is looking for happens to be in a missing volume. Many molluscan papers are published in the general scientific journals, which have a similar problem with missing volumes. That said, BHL is by far the single most valuable resource in the world for the kind of nuts-and-bolts taxonomic work that I do. As long as scanning continues, BHL can only get better. Hopefully, one day BHL will take on scanning the thousands of small works, published as leaflets or pamphlets and filed in with the departmental separates collections, rarely if ever library cataloged. Cyrillic and oriental literature is lacking so far. A lot of my scan requests have been for missing journal volumes. I check periodically to see whether Transactions of the American Philosophical Society ser. 2 vol. 15, 1873 has turned up yet. I just queried my bibliographic database and find 105 outstanding BHL scan requests, some going back to 2010. Two examples: Transactions of the Royal Society of Edinburgh requested September 15, 2010, and Neues Jahrbuch für Mineralogie, Geologie, und Paläeontologie. requested February 9, 2010. But compare that to the 2,821 books and journal papers that I've so far downloaded from BHL and it pales to insignificance.

An incalculably important feature of BHL is the taxonomic index, which allows discovery of "forgotten" papers which would otherwise continue to be lost to science. I use it heavily, and have an ongoing correspondence with the folk at Woods Hole on ways to improve the quality of taxonomic indexing, providing test data and evaluating results.

* **Wednesday, August 8, 2012**
	+ From Julio Cesar Cenci de Aguiar, via Gemini [mailto: julio\_aguiar@msn.com]
	+ This data base is fantastic!
* **Wednesday, August 8, 2012**
	+ From ms. neaux neaux, via Flickr
	+ Thank you for having images available for public use.
	+ [http://www.flickr.com/photos/msneauxneauxs-alter/7701000964/in/photostream](http://www.flickr.com/photos/msneauxneauxs-alter/7701000964/in/photostream%22%20%5Ct%20%22_blank)
	+ [http://www.flickr.com/photos/msneauxneauxs-alter/7701000710/in/photostream/](http://www.flickr.com/photos/msneauxneauxs-alter/7701000710/in/photostream/%22%20%5Ct%20%22_blank)
	+ [http://www.flickr.com/photos/msneauxneauxs-alter/7522986256/in/photostream](http://www.flickr.com/photos/msneauxneauxs-alter/7522986256/in/photostream%22%20%5Ct%20%22_blank)
	+ [http://www.flickr.com/photos/msneauxneauxs-alter/7522986134/in/photostream/](http://www.flickr.com/photos/msneauxneauxs-alter/7522986134/in/photostream/%22%20%5Ct%20%22_blank)
	+ I love your site!
* **Friday, August 3, 2012**
	+ via Twitter, @Pachelbelia
	+ @BioDivLibrary I wish one day my country will have such facilities too to boost up our biodiversity research ;)

**August – October 2012 BHL Presentations:**

