

Interim Report of the Scholarly Information Program Task Force
To the Standing Committee on Libraries and Scholarly Information
October 21, 2002

INTRODUCTION

The Scholarly Information Program Task Force was established by the Systemwide Library and Scholarly Information Advisory Committee (SLASIAC) with a charge to advise SLASIAC on new strategic directions for planning by defining and articulating a structure consisting of a vision, goals, and strategies for post-Partnership policy and resource development for management of scholarly information, including libraries. In four meetings since August, 2001, the Task Force has reviewed previous planning efforts, progress to date, and current problems and challenges in a variety of areas. A complete record of the group's deliberations is available at its Web site at <<http://www.slp.ucop.edu/consultation/sip/>>. At its May 28, 2002 meeting, the Task Force felt that a strategic consensus was beginning to emerge from this series of discussions, and that it was timely to set down this emerging consensus for consideration by SLASIAC before the University begins deliberations on its strategy for the 2004-05 budget.

The material that follows is cast in a format that addresses the elements of the charge to the Task Force, but should not be understood as necessarily complete or the last word of the Task Force on these matters. The report is offered chiefly to foster dialog, and the Task Force looks forward to further discussion and development of the strategies recommended herein.

BACKGROUND

In 1996, the Library Planning and Action Initiative (LPAI) Advisory Task Force was charged with identifying organizational, budgetary, and functional changes required to ensure the continued scholarly and economic vitality of the University of California's libraries, to guide library evolution over the next decade, and to ensure that immediate actions are taken in support of such changes and evolution.

The LPAI Task Force concluded that the primary goal for UC should be to seek innovative and cost-effective means to achieve comprehensive access to scholarly and scientific communication for all members of the University community. The Task Force recommended seven strategies to achieve this goal:

1. UC should seek innovative and cost-effective means to strengthen Resource Sharing.
2. UC should establish the California Digital Library.
3. UC should sustain and develop mechanisms to support campus Print Collections.
4. UC should seek mutually beneficial Collaboration with Libraries, Museums, other Universities and Industry.

5. UC should develop an Information Infrastructure that supports the needs of faculty and students to disseminate and access scholarly and scientific information in a networked environment.
6. UC should lead the national effort to transform the process of Scholarly and Scientific Communication.
7. UC should organize an environment of continuous planning and innovation.

Pursuant to the recommendations of the LAPI Task Force, the University has:

- Launched the California Digital Library to develop a shared Universitywide digital collection and related services.
- Stabilized the deterioration of quality of campus print collections
- Invested in systems and services to expand and enhance sharing of library resources among campuses.
- Launched the *eScholarship* initiative to promote and support scholar-led innovations in scholarly communication.
- Secured from the State \$15.7 million in permanent funds and \$14 million in one-time funds in support of these strategies.
- Established the Systemwide Library and Scholarly Information Advisory Committee, with broad representation from the University community, to monitor and advise the University on issues related to library services and scholarly communication.

These strategies, and the actions undertaken in their pursuit, have been remarkably successful in sustaining and enhancing library service for UC's faculty, students and staff. However, the success of these initiatives, coupled with the persistent problems of limited State funding and ongoing hyperinflation in the cost of scholarly information, have raised new issues that call for careful review and recasting of the successful strategies articulated in 1997. The Scholarly Information Program Task Force, at its December 12, 2001 meeting, characterized these issues as being of three types:

- 1. Integration and interdependence, both of print and digital formats and of the campuses in the evolving UC Library System.** For over twenty years, the University has used digital technology to facilitate access to and development of the multi-campus print collection of the UC Libraries as a single, coordinated collection, first through the Melvyl union catalog, and subsequently through enhanced services such as abstracting and indexing databases with links to library holdings, patron-initiated requesting, and Web-based electronic delivery of document requests. In addition to improving access, these developments have enabled campus library staff to plan and develop their local collections in the context of ever-increasing knowledge about the holdings and service capabilities of the system as a whole. In this sense, it can be said that UC library policy and practice for print collections has been interdependent with digital services for more than two decades. Experience with the development of the Shared Digital Collection over the past four years, under the leadership of the California Digital Library, has highlighted a number of additional, and perhaps more fundamental, areas of interdependence between digital and print collections. For example, many license agreements for commercial digital journals are linked in some way to the

libraries' acquisitions of the equivalent print titles, so that campus decisions about print acquisitions are to some degree constrained by the provisions of the digital license. Conversely, independent campus decisions to purchase print journals influence the University's negotiating position in licensing digital versions of those same titles. Further, as journal prices continue to rise and more funds become committed to large digital journal packages, campus libraries begin to experience less capacity to tailor collections to local needs and, in particular, to purchase needed monographs and other non-journal material. The University's Collection Management Initiative, which addresses options for managing print journal titles when their digital counterparts are available, further emphasizes the interrelationship between print and digital collections and adds the factor of library space to the trade-off equation.

- 2. Continuing sustainability of print and digital collections, including the shared digital collection.** The recommendations of the LPAI were addressed in large measure to the problem of unsustainable increases in the costs of research library materials, particularly science and technology journals. The actions taken as a result of LPAI have allowed the University to sustain and improve library service to some degree through large-scale licensing, negotiated price caps for digital journal packages, limited substitution of digital for print journals, and expanded sharing of print resources among the campuses. Notwithstanding these efforts, however, it is evident that publisher prices, for both print and digital content, continue to increase at a rate that outpaces State funding provided for this purpose. In its annual statement of price increase needs for library collections for 2003-04 (used in development of the Regents' budget request and by the State Department of Finance in its budgeting instructions to state agencies), the University estimated that it would need a 4.7 percent increase in the library materials budget (and an 8.2 percent increase in expenditures for serials) to account for inflation, while the State is expected to be able to supply, at best, a 1-1/2% to 2% increase for inflation.
- 3. Leveraging and expanding experimental efforts in scholarly communication.** The LPAI recommendation to "lead the national effort to transform the process of Scholarly and Scientific Communication" was intended in part to focus and leverage the increasing use of technology in scholarly communication to meet the emerging needs and expectations of faculty and students, and in part to stimulate the development of new and more cost-effective means of scholarly communication in order to address the problem of financial sustainability. Over the last three years, the CDL, through its *eScholarship* program, has made great strides in identifying and fostering a variety of scholar-led innovations in scholarly communication, and is now putting into place some ongoing programs based on this experience that promise long-term benefits to the University and its faculty. Significant accomplishments include the *eScholarship Repository*, which offers faculty in the social sciences and humanities a central location for depositing pre-publication scholarship, and the UC International and Area Studies Digital Collection, which publishes peer-reviewed articles, monographs, and edited volumes generated by research projects, workshops, seminars, and conferences at internationally oriented institutes, centers, and programs involving the University of California. The challenge will be to continue to translate innovations into ongoing programs that improve service to the UC academic community, introduce new efficiencies into University operations, expand the scope of exploration to all phases of the life cycle of scholarly information, and help control the spiraling cost of traditional forms of scholarly publishing and communication.

RECOMMENDATIONS

In investigating these issues in light of the University's experience and successes to date, the Task Force found that the strategies first put forth by the LPAI have proven successful in moving the University toward the stated goal of comprehensive access to scholarly and scientific communication for all members of the University community, and have been effective in addressing the problems that existed in 1997. In considering the newly-emerging issues recounted above, the Task Force concluded that the University's long-standing strategy of leveraging its formidable systemwide resources and capabilities should be continued and expanded. In particular, the shared digital collection has been remarkably effective, and the Task Force recommends that the shared collection concept be expanded beyond the digital realm to include, on a selective basis, print collections. This overall strategy offers the best possibility to capture and leverage the benefits that lie in the interrelationship between digital and print collections, presents an opportunity to improve service by better integrating access to information regardless of format, and builds upon the collaborative relationships among the campus libraries that have been established to guide the development of the shared digital collection.

In considering how to cast this recommended strategic direction in a framework useful for planning and action, the Task Force re-examined the University's vision for libraries and scholarly information, articulated proposed goals for strategic development, recommended several alternative strategies for achieving these goals (with, in some cases, examples of specific action steps that could be taken), and set forth some issues that require attention as these strategies are refined and put forth for discussion and adoption by the University community.

Vision

Elements for a restatement of vision:

- The Universitywide library collection is one of distinction, appropriate to a major research university and its research and teaching programs
- The University Libraries retain, preserve and make available for use scholarly materials of enduring value in all formats
- The University seeks to provide comprehensive access to scholarly and scientific communication in all formats, including current and recently-published material needed to support research and teaching, for all members of the University community, regardless of location.
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- The services provided by the library system and individual campus libraries are of the highest quality
- Consistent with its responsibilities to its primary clientele, the library system will make the University's rich scholarly information resources available and usable to the people of California

Goals

- Extend the shared collection concept to non-digital collections
- Integrate the digital and non-digital collections and services for planning, budgeting, and delivery of services

- Frame the collecting responsibilities of the UC Libraries in the shared and mixed collection environment – define “collections of record/excellence/distinction”
- Reaffirm the values, concepts and programs related to retention, preservation and conservation of collections and extend these to materials in digital form
- Through the eScholarship program, integrate shared infrastructure into yet more segments of the scholarly information life-cycle and additional segments of the University's community of scholarly information providers and users.
- Develop and coordinate services at the campus and systemwide level to leverage the system's capabilities to support and promote effective use of scholarly information in pursuit of the University's mission.
- Continue to explore and expand the potential of the UC library system, especially through the use of technology and the development of strategic partnerships, to provide access and services to segments of the non-UC community in California.
- Explore the changing roles of the campus libraries in light of their own strategic goals and the growing importance of shared collections and services, and identify the needs for systemwide services to support and complement them.

Strategies

1. **Sustain the Development of the Shared Digital Collection.** [text to be added]
2. **Continue to Sustain and Support Campus-Based Collections in All Formats.** [text to be added]
3. **Continue to Expand and Strengthen Resource Sharing.** [text to be added]
4. **Development, Integration and Management of the Shared Collection.** Building on its long history of collaborative sharing of library collection resources, the shared facilities and programs already in place (including the Melvyl union catalog, the Regional Library Facilities, the California Digital Library, and numerous resource sharing programs), and the success of its shared digital collection, the University should continue to leverage its systemwide strengths and shared infrastructure to cost-effectively develop, strengthen, manage and improve access to collections in all formats on a systemwide basis. Examples of actions that have been initiated, planned or discussed that are consistent with this strategy are:
 - o *Developing a Shared Print Journal Collection.* Based on the interim findings of the Collection Management Initiative (<<http://www.ucop.edu/cmi/>>), the Task Force discussed and endorsed a scenario prepared by staff describing a program in which regional library facilities would serve as the central repository for print copies of journals for which electronic content is available on all campuses via the California Digital Library (Shared Print Journal Collection (Scenario 1), 7/30/02, attached). The University Librarians and their Systemwide Operations and Planning Advisory Group (SOPAG) have discussed this scenario. The CDL already receives (or soon will receive) numbers of print journals from some publishers that are associated with the license agreements for those publishers' digital journals, and will continue to facilitate the development of shared print collections of these titles pending development of sustainable strategies and organizational and funding models for shared print materials. University Librarians recently endorsed an initiative that is a variant of the basic strategy, in which SOPAG will prepare recommendations a) for accessioning as last-copy print journals those being delivered to the CDL as part of systemwide licenses for selected electronic titles, and b) for putting in place mechanisms that ensure that campus decisions to cancel a print title do not entirely eliminate that title from the system in its printed form.

- o *Building a Unified Government Publications Repository.* A staff paper prepared by the CDL and endorsed by the Task Force describes a centralized repository for the government document collections of the UC Libraries that would reduce the substantial duplication in campus holdings of these materials, provide much-needed infrastructure to share government collections systemwide, and create a collaborative working structure that effectively utilizes the many talents of UC's government information librarians (Building a Unified Government Information Repository, 4/17/02, attached). The University Librarians have already asked SOPAG to take action in this area, and SOPAG has charged a Task Force on Government Information to develop a framework and an implementation plan for creating a unified government publications repository for the University of California Libraries, with a final report due by May 2003. This charge envisions more effective integration of print and digital formats of government documents as well as Universitywide management of these collections in all formats.
- o *Additional Shared Print Collections.* The Task Force discussed and endorsed a scenario prepared by staff that described other areas that presented opportunities to promote a higher level of efficiency and integration among collections and might therefore be candidates for development of shared print collections (Shared Print Collections (Scenario 2), 7/30/02, attached). These included a shared government documents collection (subsequently developed further as described above), a shared collection of superseded reference works, and the existing collections of the two Regional Library Facilities.
- o *University Bibliographers.* The Task Force discussed and endorsed a scenario prepared by staff that envisions the appointment of a limited number of University Bibliographers with responsibility to work in collaboration with the campuses, including the affected faculty, to develop complementary campus and shared Universitywide collections to support academic programs in defined subject areas. This idea, which emerged from a meeting of the Collection Management Planning Group (CMPG), recognizes that one persistent problem with traditional approaches to cooperative collection development, which are based on mutual agreements among libraries to maintain specialized research collections for use by all libraries in the cooperating group, is that such agreements are marginal to the collection development needs and priorities of the participating institutions, and therefore cannot take advantage of opportunities and economies that might be found by examining the collection needs of the group as a whole and the means by which those needs might be met through a jointly-developed, shared collection. This scenario has been discussed by University Librarians, and is undergoing revision and further development as a result of those discussions.
- o *New roles and processes for the Regional Library Facilities.* Many of the initiatives already discussed or under way (Shared Print Journal Collection, Unified Government Documents Repository, Additional Shared Print Collections) envision or imply new roles and additional operational responsibilities for the Regional Library Facilities. Examples could include: initial acquisition, processing and retention of the shared print copy of journal titles in the shared digital collection; acquiring, managing and servicing the print component of a shared government documents collection; managing and safeguarding a component of a nationally-coordinated "dark archive" of print copies of publications available in both print and digital form; providing high-volume digitization and digital object management services for shared digital collections. The Collection Management Planning Group is charged to oversee continuous strategic planning for collection management and advise SLASIAC as needed,

and will continue to monitor plans and activities in this area with particular attention to the RLF program.

- o *Planning for the "Collection of Record."* At its meeting on April 30, 2002, the Steering Committee of the CMPG heard a presentation from Abby Smith, Director of Programs at the Council on Library and Information Resources and Co-Author of the CLIR report, "The Evidence in Hand: Report of the Task Force on the Artifact in Library Collections" (Council on Library and Information Resources, November 2001). The ensuing discussion (see http://www.slp.ucop.edu/consultation/cmpg/CMPG_Notes_043002.html) suggested that the University might be well positioned, partly as a result of the initiatives described above, to begin formulating explicit policies regarding its obligations and intentions for permanent archiving of the significant informational and cultural resources in its collections. This has been the subject of some discussion with University Librarians and other parties, but no formal initiative has been launched in this area.
- o *Preservation and archiving of digital scholarly information.* The long-term retention of digital library materials represents an urgent problem for the University of California. Faculty are hesitant to embrace publishing in "electronic only" formats, as they require more assurance that their scholarship will endure through time. In addition, UC Libraries need to create an environment where these digital materials become part of their permanent collections, thus ensuring they are available for use by future generations of scholars. Finally, the University must be concerned with protecting its significant and growing investment in these digital assets. In view of these issues, in April 2001 SOPAG created a Digital Preservation and Archiving Committee to define the functionality of an archival repository that would help to mitigate the risks of losing digital materials over time. That committee's report was delivered in October 2001 (see <http://www.slp.ucop.edu/sopag/DPACFinalReport.pdf>), and planning is currently underway to implement the recommendations of that group.

5. Continued Development and Integration of Innovative Scholarly Communication Experiments and Programs into the Portfolio of Ongoing Services to the UC Community.

While continuing to foster scholar-led experimentation in scholarly communication, systematically identify products, services, and infrastructure capabilities that merit ongoing support as part of the portfolio of scholarly communication services that are offered to the University community on an ongoing basis, and integrate these into the University's library and information services at all levels, while exploring the application of these capabilities throughout the scholarly information life cycle and engaging additional communities of curators of scholarly resources in this process. Examples of actions that have been initiated, planned or discussed that are consistent with this strategy are:

- o *Faculty focus groups on scholarly communication.* Pursuant to the May 2002 joint meeting of SLASIAC and the Standing Committee on Copyright (see http://www.slp.ucop.edu/consultation/slasiac/notes_052302.html), which was devoted to issues of scholarly publishing and communication, the University Librarian for Systemwide Library Planning and SLP staff are working with the Academic Council leadership to plan and execute a series of faculty focus groups on these issues.
- o *Museums and other curators of scholarly information.* Continuing the work initiated by the CDL in the Museums in the Online Archive of California (MOAC) project (<http://www.bampfa.berkeley.edu/moac/>), discussions are continuing on how to identify other University entities that collect and curate significant scholarly resources and explore the means by which the infrastructure, tools and services of the CDL might be extended to help develop, provide access to, and preserve their digital assets.

- o *Unpublished and at-risk digital information.* Continuing the successful establishment of the eScholarship Repository with an initial focus on working papers in the social sciences (<<http://repositories.cdlib.org/escholarship/>>), discussions are continuing on how the infrastructure, tools, and services of the CDL, including the Repository infrastructure, might be extended to capture, organize, preserve and provide access to other scholarly information produced by the UC community at various stages in the scholarly information life cycle.
 - o *Instructional applications.* As part of the ongoing strategic planning process within the CDL, staff are giving attention to (a) ensuring that the digital assets managed by the CDL on behalf of the UC Libraries are accessible and usable for instructional applications, and (b) considering how to ensure the persistence of these assets and their associated applications for instructional purposes.
- 6. Identifying and re-aligning responsibilities for campuses and systemwide operations and services.** To the extent that new opportunities and expectations for library and information service intersect with an increased strategic emphasis on multi-campus collaboration and resource sharing and development of Universitywide collections, services, and infrastructure capabilities, systematically examine the goals for library and information service at each campus and systemwide, and the relationships between them, and identify areas for redefinition of roles, responsibilities, and relationships at the campus and systemwide level.
- 7. Leverage Shared Collections and Services to Expand Service to the Public.** To provide enhanced support for the University's public service role while minimizing unintended adverse impacts on campus library collections and services, make collaborative use of shared collections, services and infrastructure to provide improved access to the University's rich information resources to selected public constituencies.
- o [Example to be described]
- 8. Continual Assessment and Planning for Libraries and Scholarly Information.** To improve the ability of the University to continually assess the outcomes of its strategies for libraries and scholarly information and adjust strategic directions in light of its successes and changing external conditions, develop and operate systems and services that usefully assess the current status and ongoing progress of the system in light of existing and emerging strategies, programs, and relationships, with special attention to assessing the characteristics and benefits of shared collections and services. Examples of actions that have been initiated, planned or discussed that are consistent with this strategy are:
- o *Costs and Benefits of the Shared Digital Collection.* Staff of Systemwide Library Planning and the CDL are collaborating on a project to define and document the organizational, budgetary, and service benefits (and associated costs) accruing to the shared digital collections and services made available since the establishment of the CDL. Preliminary findings from this investigation should begin to be available by mid-October 2002.
 - o *Metrics for the Shared Collection.* Traditional benchmarking measures for research libraries, such as volumes held and added, current serial subscriptions, and total staffing, are clearly inadequate for assessment of either digital collections and services, or the resources and services made possible through the development of shared collections. In consultation with University Librarians, SLP staff are preparing to initiate a project to identify appropriate metrics for the UC libraries that account for the information resources provided by integrated print and digital collections and by the availability of shared collections in all formats, as well as the issues of ownership that are entrained in these concepts.

Challenges for Plan Development

1. Consult constructively with major constituencies: academic senate and faculty, academic administration (especially EVCs), budget administration, University Librarians and library staff, marshal support among all constituencies for the importance of the library, and develop effective communication mechanisms and programs to inform and engage internal and external constituencies regarding the current strategic planning initiative and continual assessment and planning.
2. Foster willingness among the faculty to experiment with and accept new methods of creating, managing, publishing, discovering and gaining access to scholarly information.
3. Define the University's partnership with the public with regard to library collections and services
4. Framing the dialog regarding redefinition and re-alignment of campus and systemwide roles and responsibilities for library services
5. Identify organizational and funding models appropriate for sustaining the shared and integrated print and digital collections of the University.
6. Identify and frame initiatives for new State funding in support of these strategic directions.

Comments Received

1. Comments that may be accommodated within the existing recommendations.

From Trudy Heinecke:

... Throughout the report there is repeated emphasis on sharing, collaboration, access to service, evolution of campus and systemwide roles -- in terms of defining what the *institutional role and perspective* of the UC Library system in its broadest sense should be in the future.

I think what is missing is a broader definition of the library "user" of the future. I noted a comment made at our 3-22-02 meeting ... that libraries should *support/assist users in "personal information management" in the digital environment* -- whether it is how documents are delivered to a user's PC, providing a faculty member with digital access to a departmental collection/database/serial subscription at another campus, or assisting in the development of a repository for unpublished materials. User expectations of the services/support roles that libraries can/should provide have changed and expanded -- this is the "why" of the library plan rather than the "how." This perspective could be provided as a part of the vision or goals section--including the expectations/needs of faculty, students, and the larger community.

To the extent that the "user perspective" and associated services discussed in this comment are seen as properly emanating from the campus communities, this observation might be accommodated by the goal to "Explore the changing role of the campus libraries..." and by Strategy 6, "Identifying and re-aligning responsibilities for campus and systemwide operations and services." These portions of the report might be rewritten to more strongly emphasize the user perspective.

2. Comments that invite clarification or additional exposition of recommendations.

From Tom Leonard:

I second Trudy Heinecke's call for a more robust statement of *who* we plan to serve. The penultimate bullet in the Goals section has the unfortunate phrase, "services to segments of the non-UC community in California." We should invoke the language of UC's Land Grant heritage and point out that all Californians may use our collections and that we are part of every high-level research effort in the state. Of course there is a danger of raising false expectations for borrowers and remote access, but I think there is a greater danger in allowing UC to seem irrelevant.

Trudy points out that new types of collections and services will be needed to meet the needs of future users (institutional repositories for instance). Here I think we need to promote ourselves more, based on our track record of sustainable and scalable ventures. What we really have to offer is the discipline that may prevent our campuses from building clusters of one-off solutions or frightfully expensive Learning Management Systems. Aren't we in a position to claim that libraries have the core values most needed for a period of innovation? This would be a reaffirmation of several of the seven LPAI strategies from 1996.

Add Preservation to Vision section

Strong and appropriate notes about Preservation follow the Vision section, but that important idea is missing here. Let's add it. Possibly it belongs with the reference in bullet 4 to "enduring value."

Vision and Arts

We have neglected the fine arts and the performing arts in talk about the reach of our collection. I am sure this was inadvertent, but it will be noticed.

Here are my edits (in bold) of the Vision bullets:

- The University seeks to provide comprehensive access to scholarly and scientific **advancements as well as defining work in the arts** for all members of the University community, regardless of location.
- The University's library collections and services contain or provide ready access to current and recently-published material needed to support research, teaching, **and achievement in the arts.**

From the CDC:

We are in accord with the goal to frame collecting responsibilities of UC libraries in the shared and mixed collection environment. Coordinating a collection development approach however, from a "distinctive" or "excellence" perspective is, in our view, troublesome. It is CDC's recommendation that shared collections would more reasonably be pursued from a "collections of record" planning basis.

Another concern was expressed about the document's last bulleted goal to redefine specific roles and responsibilities of local campuses in relation to local and systemwide needs. CDC members expressed uncertainty regarding the meaning of this goal. Some CDC members suggest that wording should acknowledge some flexibility in dealing with both local and systemwide needs.

Finally, the concept of University Bibliographers, which originated in CDC, needs further clarification than what is outlined in this preliminary report. We understand the concept has been discussed by the University Librarians and requires further development. CDC offers its assistance to elucidate the role specialized bibliographers could hold in this collaborative framework.

3. Comments that suggest additional goals or strategies.

From Cecily Johns:

Strategy #2: We need to begin to discuss strategies for systemwide reduction of redundancy in the acquisition of print materials, coupled with increasingly effective document delivery tools, whether we utilize common approval plan profiles or some other methodology. Maybe the article in the Chronicle was prophetic.

4. Comments that invite reconsideration of proposed goals or strategies.

From Tom Leonard:

Strategies 6 and 8 over-reach.

#6 "Universitywide collections" gets ahead of the discussions that I have participated in. This will be a lively topic for the ULs this fall. Now, I only feel comfortable with "Universitywide digital collections."

#8: In consultation with University Librarians, SLP staff are preparing to initiate a project to identify appropriate metrics for the UC libraries that account for the information resources provided by integrated print and digital collections and by the availability of shared collections **or new forms of access** in all formats, as well as the issues of "ownership" that are entrained in these concepts.

There is nothing wrong with saying that "shared collections in all formats" will be studied, but this should be linked to the access challenge. In my view, access is the heart of the matter.