Unlocking the Digital Age

UNLOCKING THE DIGITAL AGE

The Musician's Guide to Research, Copyright, and Publishing

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JOHNS HOPKINS
PEABODY INSTITUTE

Recommended Citation:

DeLaurenti, K., & Copland, A. I. (2024). *Unlocking the digital age: The musician's guide to research, copyright, and publishing.* The Peabody Institute of the Johns Hopkins University. https://pressbooks.pub/musicresearch

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CONTENTS

FOREWORD

Dean Fred Bronstein

Congratulations on taking a significant step towards mastering your creative output in the rapidly evolving, and at times dizzying, world of music in the digital age. As musicians, your success in today's world involves navigating the complexities of research and publishing in the digital landscape as much as creating and performing music. It's a thrilling, albeit challenging, journey that requires not just talent, but also knowledge and adaptability.

Musicians in the 21st century are innovators and pioneers. The digital era presents uncharted territory where the rules of engagement and possibilities are constantly evolving. Your pursuit goes beyond mastering your instrument or perfecting your vocals; it involves understanding the intricacies of research, copyright, and the nuances of publishing in a world where tradition and innovation exist together and present ever-changing opportunities. In this era, being a great musician is just the starting point. The real challenge lies in sharing your work effectively while reaching new constituencies, protecting it, and building a sustainable career in a landscape that is always in flux.

You may already be grappling with the changes happening in the ways that musicians are creating, funding, and sharing their work. In *The Path to Funding*, the authors demonstrated practical approaches to articulating your mission to secure funding and create a sustainable career while charting your own path to success. This companion book helps you build the same practical approaches to navigating changing research, copyright, and publishing environments.

As the digital landscape continues to reshape the music industry, it's imperative that you equip yourself with the knowledge and skills to thrive and adapt. However, it can be overwhelming to think about all of the work that happens outside the practice room to make success a reality. This guide is an essential resource in helping you see why this work is valuable and how to build sustainable and manageable workflows that effectively leverage the digital space. The authors share their experience as librarians, performers, and scholars and give you practical tools to manage your information overload, copyright administration, and publishing decisions. They also bring in extensive research and real-world experiences of musicians who have successfully navigated these paths. It bridges the gap between your artistic passion and the practical aspects of building and sustaining a career in the digital age.

I invite you to dive into this guide with an open mind and a willingness to embrace new concepts. It might seem daunting at first, but remember, every challenge is an opportunity to grow, build audiences, and redefine your art. Use this book as a tool to enhance your understanding, protect your creations, and confidently step into the world of digital music. Embrace the journey with the same fervor you bring to your music and let this guide be a catalyst in shaping a fulfilling and sustainable musical career.

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January 2024

About the author

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Fred Bronstein, DMA—an accomplished pianist, dedicated music educator, and successful chief executive of American orchestras—has served as the inaugural Dean of the Peabody Institute of the Johns Hopkins University since 2014. Bronstein is an advocate for equity and inclusion and outspoken in his belief that attracting new and diverse audiences is necessary to the future of the performing arts. Early in his tenure, Bronstein instituted a comprehensive, strategic Breakthrough Plan to focus Peabody on growth, expansion, and improved financial stability, which has resulted in new initiatives including a curriculum that redefines the educational model for aspiring artists, preparing them for 21st-century careers. Other milestones under his leadership include the 2018 launch of innovative academic programs in dance and in music for new media, and establishing the Johns Hopkins Rehabilitation Network Clinic for Performing Artists at Peabody, the first of its kind on a music school campus. Bronstein has led Peabody in establishing ties with other JHU schools and with Baltimore community programs to bring performance and arts education beyond the halls of the Conservatory.

Prior to joining Peabody, Bronstein served as president of the St. Louis Symphony Orchestra, Omaha Symphony, and Dallas Symphony Orchestra. As a performer, Bronstein toured for eight years as part of Aequalis, a chamber group he co-founded with a focus on new American music, innovative programming, and educational outreach. He received his Doctor of Musical Arts degree from the State University of New York, Stony Brook.

PREFACE

Why This Book?

As musicians trained in a conservatories, we understand the demands that are placed on musicians and performers throughout their careers. While musicians are deeply collaborative people, audiences rarely experience the hidden, solitary hours spent in practice rooms and at rehearsals developing the techniques necessary to bring together a live performance. This isn't limited to classical music: contemporary composition, jazz, experimental music, improvisation, and performance art are steeped in diverse oral traditions where artistic practice is shared from mentor to student over a lifetime of artmaking. The authors are musicians who have also pursued information science and know the challenges of leaving and returning to an artistic career.

As a classically trained opera singer, Kathleen DeLaurenti first stepped onto the stage at age 10 with Dame Gwyneth Jones in Pittsburgh Opera's *Turandot*. After completely four years of conservatory operatic training and a stint as DJ at college radio station WRCT, found herself moving across the country in her early career. Then-newly available internet radio was a vital connection that allowed her to maintain her musical community. When changes to copyright law threatened internet radio in the late 1990s, Kathleen pursued librarianship to advocate for balanced approaches to copyright, help artists navigate research and copyright issues, and develop policy aimed at helping the arts thrive in a constantly shifting information economy.

In 2017, Andrea Copland enrolled at Peabody as a graduate student, pursuing dual majors in oboe and musicology. That same year, Kathleen began her role as the director of the Arthur Friedheim Library. After graduation, Andrea joined the library staff as the first engagement and instruction librarian. This led to a collaboration with Kathleen, focusing on how research integrates into the Peabody Conservatory curriculum. Together, they aimed to teach skills that enhance students' media and information literacy beyond their course work.

Kathleen and Andrea both initially trained in the performing arts, but their current careers in librarianship require expertise in the social sciences. As practicing librarians, Kathleen and Andrea are trained and interested in understanding how information moves through society as well as how learners of all backgrounds interact with information resources to be better performers, researchers, and people.

From this unique perspective as musicians and social scientists, Kathleen and Andrea are curious about how performers in training need to apply knowledge of the information landscape to their entrepreneurial practices. They collaborate with colleagues in curriculum and instructional design to develop new ways to implement information literacy and research practices into the traditional conservatory curriculum. This culminated in the redesign of *Foundation of Music Research*, a new approach to graduate music information literacy designed specifically for performing musicians.

As the professional studies curriculum at the Peabody Conservatory evolves, students are engaged and thriving in learning how to build professional practices into their artistic practice. In this course, Kathleen and Andrea have worked to construct a parallel pathway that helps students connect their

musicology and theory seminars to professional studies and studio work. Fostering these connections is a major component of this book.

Purpose

Contemporary musicians have more information available to them than ever before. Evaluating sources to find the most reliable information can be overwhelming, especially when the most thoroughly vetted informational platforms are only available behind paywalls.

This book helps music researchers at any experience level build strategies to increase efficiencies in acquiring, evaluating, and using the vast quantities of information available to them.

Such skills position today's musicians to spend less time trying to make sense of 3 million results in a Google search and more time contextualizing their thoughts, ideas, and artistic projects. This is critically important because the performing artist is not just experimenting in the isolation of a lab and sharing the results of repeated trial and error. Live performance is a volatile experience where the results of research, and sometimes even the research itself, happen in front of a live audience.

This research exists in a place between the academy and practice. Even today, many creative researchers at colleges and universities have different ways of demonstrating their work, unlike colleagues who publish monographs or scientific articles. Even in disciplines like musicology or ethnomusicology, which share some methodologies with other fields in the humanities, we see increasingly creative outputs, like Anna Kijas' interactive biography *Documenting Teresa Carreño* or the powerful *Musical Passage* project by Laurent Dubois, David Garner, and Mary Caton Lingold. Creative research can also entail historical practice, discovering the socio-historic context of music, or designing performances to engage audiences around specific learning goals. The authors want every musician to see the scholarship in their creative work, even if it is not peer-reviewed. The legacy of training and research that goes into every performance means that all musicians are also **musician-scholars**.

With this book, we hope to help students better understand different modes of creative research and how that fits into the larger landscape of research and information. Post-COVID, many of us are wary of faulty research—or even research taken out of context—and how quickly misinformation spreads via social media. It's therefore imperative that as a society we critically assess information to mitigate the spread of misinformation, whether we're interpreting research from scientists or researchers in the arts.

Beyond evaluating information, the musician-scholar must also strive to share the results of research ethically and legally in a way that aligns with their personal values and **artistic mission**. Recent technological advances allow the musician-scholar to maximize opportunities provided by new technology to make stronger connections to their audiences. We want to make sure that today's musician-scholar has a solid foundation in how information systems have evolved. The reader will learn how to harness these skills, not only to make informed decisions about using the work of others but also to share their own work as they build these connections. Beyond consuming and creating research, we want to empower artists to advocate for emerging systems that value art and society over profits.[1]

1. Drew Schwartz, "Artists Can Make Millions Selling Their Catalogs to Private Equity. Should They?," Vice (blog), January 15, 2021, https://www.vice.com/en/article/wx84yz/why-so-many-musicians-are-selling-their-catalogs-bob-dylan-neil-young-shakira-hipgnosis.

In this book, unlike existing music research texts, we do more than focus solely on resources and techniques used in musicology and historical research. Instead, we endeavor to help readers understand how our current publishing system works and how that impacts where and how they might access content. We also know that by learning this kind of system-oriented knowledge, researchers can apply their skills and master any kind of search environment.

To that end, this book contains techniques for searching, information on how search systems are built, and information about open access and publishing economies. We introduce the basics of copyright so readers can understand why some materials may not be readily available online, how to approach the use of copyrighted material in their own work, and how to make decisions about sharing their work with a broader audience.

Audience

For Artists

This book is meant to assist musician-scholars in the early stages of their transition from student to professional artist and more seasoned musician-scholars who want to build solid strategies for incorporating research into their practice. Some of the basic research skills we cover may be familiar to readers. We have consolidated a few traditional academic resources into a simple reference guide and research companion for practicing artists based on established sources and strategies. Rather than digging through endless search engine results trying to determine accuracy and credibility, readers gain strategies for finding and evaluating information that fit their unique needs.

This book also helps learners build a skill set to efficiently find and synthesize high-quality information outside the conservatory and university settings. Understanding how publishing and information economies work—including how to leverage the power of **open access**—streamlines any research process. It also helps researchers make informed decisions about their publishing options. Finally, we introduce copyright essentials so creators can ethically and legally use existing information in any format and understand how the law impacts their own work.

For Instructors

This book may not seem like a good fit for the traditional required music research course—few music research (or "bibliography") courses are structured like ours. Because our students are focused on their professional next steps after the master's degree, and many have not had access to academic libraries in their undergraduate education, we focus on building solid foundational information literacy skills and helping students understand how they relate to their professional work. If you teach a similar course and we are not in touch, please let us know.

We are always looking for ways to expand and improve education for researchers in music and the performing arts. As such, we encourage instructors to take full advantage of the open nature of this text: It is licensed to be translated, remixed, excerpted, and leveraged in the ways you deem best to help your students master the learning goals of your course. Reach out to us if you adopt or adapt any part of the text.

We also hope this text will be useful to other curriculum areas. While presented here as a unified

book, we encourage instructors to excerpt the text where it may be useful. The research sections can be used in many information literacy contexts, while the copyright and publishing sections might be appropriate to bolster stand-alone assignments or flesh out concepts in introductory music business courses.

For Librarians

Librarians are often asked to collaborate with faculty to deliver instruction in music and the performing arts as teaching partners. The research section of this book serves as a compendium of skills and concepts we often teach separately and reference in disparate places in our work as librarian-educators. The copyright and publishing sections may be helpful for librarians collaborating with faculty, especially those who want to introduce these concepts and need foundational texts that are cohesive and provide a solid foundation for specialized assignments.

Organization

In this book, we explore three critical areas: developing a solid practice in research foundations; understanding the essentials of copyright; and navigating the complexities of publishing practices. This book equips you with the knowledge to succeed in today's diverse music research and publishing landscape.

Part I. Research Foundations

The text begins by building strong research practices that serve the multidisciplinary needs of modern musician-scholars. As citizen artists, you are often asked to understand community needs, teaching theories, and social or urban planning when devising projects with community impact. This requires a strategic skill set to find, evaluate, synthesize, and share research findings across many disciplines.

Part II. Copyright Essentials

By developing some basic competencies in copyright, you can confidently develop projects that consider potential legal and ethical issues when using copyrighted works. We provide an accessible compendium of the different licenses and exceptions to copyright most often used by musician-scholars. In addition, you will understand possible avenues of revenue for your work. This ensures that your projects include adequate funding to manage any copyright administration.

Part III. Publishing Practices

Understanding traditional and modern publishing practices can help you decide how to disseminate your work. In a complex world where publishing decisions can impact how you and your audience access your work, musician-scholars are often uncertain when to collaborate with publishers or follow a do-it-yourself path to sharing their work. We provide you with the a history of how publishing evolved and how to manage your own publishing projects today so that you can make decisions that maximize your professional goals while remaining aligned with your artistic mission.

Features

Throughout this book, you will find exercises to help you plan, conduct, and organize your research and publishing projects. Each chapter will follow the story of a group of musician-scholars through illustrated examples that help learners imagine how to apply these concepts and skills. In addition to a narrative example, we also include perspectives from an expert panel of musician-scholars whose members share the various ways research is a part of their professional creative lives. References are provided at the end of each chapter with bibliographies provided in each section. Glossary terms are defined within the text and compiled at the end; they are bolded the first time the appear in the chapter.

Unlocking the Digital Age: The Musician's Guide to Research, Copyright, and Publishing is available in digital formats. While it is available for learners to print in PDF or EPUB formats, it is designed for online interaction. While readers are welcome to print copies to interact with and annotate in any way they desire, this publication was designed to be interacted with in a digital environment where resources, references, and templates are linked and available online.

All hyperlinks open in new tabs. When publicly accessible websites (e.g., Google, Google Scholar, YouTube, Spotify) are shared, they are linked the first time they appear in the chapter as well as in the exercises.

Expert Panel

We spoke with musician-scholars about how they incorporate research into their practice. They also shared their experiences with questions about copyright and publishing choices. Visit the About the Artists section for full bios.

- Christina Farrell, teaching artist
- Jonathon Heyward, conductor
- Lauron Kehrer, musicologist and ethnomusicologist
- Kyoko Kitamura, vocal improviser, bandleader, composer, and educator
- Suzanne Kite, artist, composer, and academic
- Paula Maust, performer, scholar, and educator
- Robin McGinness, operatic baritone and career coach

ACKNOWLEDGEMENTS

Like all open education projects, this book could not have been possible without commitment, creativity, and collaboration from across the Peabody Institute and beyond.

Kathleen DeLaurenti and Andrea Copland were inspired in this work through collaborations with Peabody's career services office, LAUNCHPad. Colleagues Zane Forshee, Christina Manceor, and Robin McGinness influenced their approach through the development of the professional studies Breakthrough Curriculum, which was designed to help Peabody students successfully launch their artistic careers through establishing business, marketing, and funding strategies. These concepts became central to reshaping the Foundations of Music Research course, the basis for this textbook. *Unlocking the Digital Age: The Musician's Guide to Research, Copyright, and Publishing* is the realization of ongoing revisions guided by student feedback as well as the specific ways that the changing realities of knowledge production, distribution, and access impact musicians.

Valerie Hartman anchored this book from conception to publication. Her expert management was key in ensuring this project evolved from an offhand comment in a meeting to a reality. She provided thoroughly scaffolded architecture behind the scenes from planning to publication. Kathleen is especially grateful for Valerie's ongoing support during challenging moments in the process, when it seemed like publication might not be possible. This team has often talked about the value of having an "abort" button in our collaborative process, and Valerie ensured that we knew where that button was—but we never had to use it. Valerie also provided her keen editorial eye in helping to shape the structure and aid in the revision process. *Unlocking the Digital Age: The Musician's Guide to Research, Copyright, and Publishing* would not have been realized without her incredible contributions.

Joseph Montcalmo was present at every point in the project, providing helpful feedback and keeping the project from getting bogged down in the details. He also was key in working with our illustrator, Don Lowing, and helping the subject matter team communicate visual ideas to produce the wonderful cover art, graphic illustrations, and example panels throughout the book. In addition, Chartae' Anderson, the newest member of the open education team at Peabody, stepped in as we came to the finish line. She provided expert editorial suggestions, especially with the glossary and specialized terminology, and led our efforts to explore some of the more interactive graphic elements. Both of their contributions elevated the project, engaging learners and enriching their experience with the text. Peabody student Dylan Heid prepared the artist interview transcripts for the Expert Panel chapters.

Kirk-Evan Billet has been a grounding voice in conversations about the intersections of research and praxis for professional musicians at Peabody. He first brought the term "musician-scholar" into conversation with Kathleen. His contributions through ongoing discussion and brainstorming sessions helped shape the foundational ideas we share here.

As a team, we continue to rely on talented artists and musicians to add their perspectives, helping our learners see how experts use the information we share here in their professional musical lives. We are grateful to Christina Farrell, Jonathon Heyward, Lauron Kehrer, Kyoko Kitamura, Suzanne Kite, Paula Maust, and Robin McGinness for sharing their wisdom. We hope learners find inspiration from our expert panelists' perspectives and experiences that help guide their professional careers.

We are also grateful to the colleagues who reviewed the manuscript and provided insightful guidance: Naz Pantaloni of Indiana University and Carrie Russell, a public policy staff member at the American Library Association, helped to ensure that the copyright and publishing sections were free of legal error while remaining readable for a nonexpert audience. Taylor Greene of Chapman University, Angela Pratesi of Bowling Green University, and Z. Sylvia Yang of DePauw University added their expertise as librarians working with musician-scholars; their subject matter feedback was invaluable.

Kathleen is especially grateful for her colleagues, too numerous to name, who have offered mentorship and a community of boisterous discourse and growth, particularly on policy and educational issues relating to copyright. Many of the frameworks, ideas, and tools in this book owe a great deal of gratitude to these colleagues from the University Information Policy Officers, Library Futures, the IPLC copyright community, and beyond. Kathleen would also like to extend a special note of gratitude to Christopher DeLaurenti whose 25 years of editorial experience enhanced the clarity of the text to help learners have valuable engagement with these ideas.

Finally, this book would not have been possible without the ongoing support and encouragement of Peabody Institute Dean Fred Bronstein and the executive leadership team at the Peabody Institute: Townsend Plant, Sarah Hoover, Kirsten Lavin, Paul Mathews, China Wilson, and Samuel Wilson. We thank them for their continued investment in sharing Peabody's work openly with artists everywhere.

PART I

RESEARCH FOUNDATIONS

1

WHAT IS RESEARCH?

Kathleen DeLaurenti

Why Research?

What is the foundation of music research in the 21st century? When we think of a foundation, we might immediately imagine buildings, maybe even libraries and universities where scholars conduct research surrounded by dusty volumes. But in this book, we provide the foundations to understand the unseeable systems that manage the organization, distribution, and access to knowledge that every **musician-scholar** needs to know. Together, we will also grapple with the difficulties of defining what research is so that musician-scholars will locate the ways that research and practice are intertwined in the arts.

While there are incredible artifacts and manuscripts waiting to be explored in countless archives and museums, many of us go about our daily lives with miniature computers in our pockets. Providing nearly instant access to terabytes of information, our cellphones connect us not only to our friends and family, but also to news, books, documentaries, music, films, and productivity tools. As our lives continue to intertwine with technology, the line between work and personal life only blurs even further. The ongoing avalanche of information has also blurred the lines between learning and research.

The COVID-19 pandemic made many of us even more aware of how blurring definitions of learning and research can impact our society during a global crisis. Researchers worked overtime to understand the pandemic and the disease itself while making advances in treatment. But many people outside the medical community found it difficult to sift through information and find trusted research to make informed personal public health decisions. Arguments about vaccine safety were common on social media. We found ourselves confronted with politically motivated disinformation campaigns injected into addition to an overload of user-generated content designed to generate advertising revenue. People who supported and disapproved of vaccines claimed that their positions were right because they had "done their research" by watching online videos or cherry-picking articles that supported their beliefs. Others argued that merely consuming research on a topic did not constitute conducting actual research. There was near constant confusion about who had expertise and some communities saw first-hand how acting on shared misinformation could have serious repercussions.

Many novice musician-scholars also struggle with understanding where learning stops and research begins. Some overestimate their research skills; others underestimate their research skills but aren't sure how to gain more proficiency with research. Faced with an overload of information and unsure of who to trust, some musician-scholars are concerned that the work they do as creative researchers doesn't qualify as research. Others may do too little research. As a musician-scholar, it is important to understand that you can do research without a tenure-track faculty position; but your research must be grounded and scoped to the context of your work. It should also be thorough enough that it demonstrates going beyond cherry-picking evidence to make a persuasive point. It should summarize and synthesize existing scholarship to take a multiplicity of perspectives into account.

It may be surprising that there is so much confusion over how to define research. Even researchers themselves have been grappling with this long-standing problem. We can start by examining how research is defined in *The Belmont Report*, the 1978 landmark work that provided researchers in the United States with guidelines for ethical practices and protocols for human subjects research. The report defined research as "an activity designed to test a hypothesis, permit conclusions to be drawn, and thereby to develop or contribute to generalizable knowledge (expressed, for example, in theories, principles, and statements of relationships)."[1] This definition helps us locate the line between our learning practices and the actual work of research.

As you work through this book, you will learn how knowledge is produced, shared, and disseminated in order to embark upon research at any point in your creative process. We also introduce frameworks to help you assess your information needs and make your research process efficient and clearly defined. This prepares you for a research landscape where **search engines**, **algorithms**, and search interfaces are constantly changing. You will also have the opportunity to practice and apply skills in any research

1. Office for Human Research Protections (OHRP), "Read the Belmont Report," Text, January 15, 2018, https://www.hhs.gov/ohrp/regulations-and-policy/belmont-report/read-the-belmont-report/index.html.

environment available to you. You do not need expensive database subscriptions or an academic library membership to try this book's exercises. By understanding the broader perspectives and historical roots of publishing and knowledge-sharing systems, you can better evaluate and leverage any research tools available.

In the previous book in Peabody's LAUNCHPad series, *The Path to Funding: The Artist's Guide to Building Your Audience, Generating Income, and Realizing Career Sustainability*, the authors emphasize aligning your **artistic mission** with your audiences and funders to build a sustainable career.[2] While your artistic mission is inherently personal, research can demonstrate the value of your art to possible funders and can connect to your audience.

> "I never asked why music exists. I think I should have asked that much, much sooner… Once I started asking those questions, I realized that I could approach music in a more holistic way." **Kyoko Kitamura**

When you step back and ask questions to better articulate your artistic mission or fill in the gaps for a grant application, you will discover where research fits into the process of communicating the value of your work. Research in a creative context can happen before a performance, be expressed in performance, and even become the performance itself. When you strategically pair your mission with a research plan in performance, education, or community engagement work, you are also better equipped to assess the success of your creative projects and share those results with audiences and funders. Understanding first what kind of context might drive your research needs and then clearly identifying those research needs is as important as a clearly articulated mission.

Scientists have not often thought about sharing their research beyond a scientific publication but musician-scholars are always planning mission-driven approaches to sharing their research results. In the following chapters, we create a framework for research in a creative context. You will integrate research into your artistic practice to support achieving your artistic mission—from the start of your creative work to building longer-term career plans. But first, let's expand on what we mean by research in a creative context.

What Is Research?

What is research? Historically, this simple question has proven difficult to answer.

- Is reading scholarly articles research?
- What about exploring a new topic on industry websites?
- Does research only happen when experiments are conducted in scientific labs?

Since 2018, we have asked hundreds of students to define research. The overwhelming response they share is rather simple: *Research is the process of compiling facts and evidence to support a thesis.*

When musician-scholars transition from an educational environment to a professional one, some believe they are leaving research behind. It's tempting to think your research career ends when you

2. Zane Forshee, Christina Manceor, and Robin McGinness, *The Path to Funding: The Artist's Guide to Building Your Audience, Generating Income, and Realizing Career Sustainability* (The Peabody Institute of The Johns Hopkins University, 2022), https://pressbooks.pub/pathtofunding/.

submit your last term paper, but research involves many different **methods** and can be done using many different **methodologies**. Your artistic work can span a research spectrum that includes everything from gaining expertise in a performance practice to collaborating with teaching artists on research studies. Unlike laboratory scientists, you won't emerge from the practice room with a scholarly paper ready for **peer-review**! As an artist whose research is almost inseparable from practice, you are much more likely to take the stage for a very different kind of evaluation from an audience.

Yet it is important not to oversimplify the role of research in your artistic life. Many young musicians have a narrow view of research. They may think it is limited to the work they do to understand a musical composition they are learning for the first time. However, that assumption ignores many kinds of creative research contexts that are often critical to developing and advancing your artistic process.

In Chapman and Sawchuk's article "Research-Creation: Intervention, Analysis and 'Family Resemblances," the authors establish a framework for understanding the different ways researchers in creative fields approach their work. They introduce the term "**research-creation**" to help us define new kinds of research that encapsulates contemporary media experiences and **modalities** of knowing that have been emerging from social sciences and humanities disciplines.[3] Research-creation, which is becoming a standard term in Canadian scholarship, has been paralleled by similar terms in other regions.

In Britain and Australia, scholars refer to this kind of work as "practice as research," while in the United States, the term "arts-based research" is commonly used. Highlighting the convergence of these two domains, these terms attempt to articulate how creative professionals integrate practice and research in their work. However, practice as research seemingly conveys that merely performing music is research. Similarly, arts-based research can often be confused with research about the arts. We use **research-creation** in this book to center the inseparable relationship between research and creation.

1-1. Dig Deeper

Reflect on how you feel about research today in your **research journal**.*

- How do you define research for yourself?
- What research skills do you feel confident about?
- What research skills do you want to develop?

**we recommend keeping a print or digital research journal to document the development of your research-creation projects*

Modalities of Research-Creation

To better understand the ways in which research and creation intertwine, Chapman and Sawchuck articulate four modalities of research-creation.[4] Whether you are preparing new repertoire, realizing a new performance practice, or collaborating with a community, you are certainly performing or

3. Owen B. Chapman and Kim Sawchuk, "Research-Creation: Intervention, Analysis and 'Family Resemblances,'" Canadian Journal of Communication 37, no. 1 (April 13, 2012), https://doi.org/10.22230/cjc.2012v37n1a2489.
4. Chapman and Sawchuk.

composing. Beyond your artistry, you are also engaging in research-creation practices as a musician-scholar.

When you expand your definition of research to include these four modalities, you can build strategies for your research-creation process. Knowing which modality you will employ can help you clarify your information needs and employ the right skills and techniques to meet your goals. In addition to thinking about how these modalities exist in your work, we invite you to add the concept of being a musician-scholar to your identity. Seeing yourself not simply as a musician, but a musician-scholar, prepares you to engage research-creation in any modality of your artistic work.

The four modalities Chapman and Sawchuk present are:

1. Research-for-creation
2. Research-from-creation
3. Creative presentations of research
4. Creation-as-research

Let's dig a little deeper into understanding each of these modalities and how you might relate your own work to them.

Research-for-creation

> "Students ask why it matters to study this. 'Other people are studying that. I just want to play really well.' We should all want to play well, but playing well can be significantly amplified by also doing research, and you can have this balance of both and they both inform each other." **Paula Maust**

According to Chapman and Sawchuk, **research-for-creation** is the "gathering of materials, practices, technologies, collaborators, narratives, and theoretical frames that characterizes initial stages of creative work and occurs iteratively throughout a project."[5]

This definition might seem obvious to many performing artists. We all do research on the sociohistoric context and theoretical analysis of music we are performing. In fact, there is a research discipline—**dramaturgy**—dedicated specifically to this work in live narrative art forms including musical theatre, nonmusical theatre, and opera.

Research-for-creation is generally the modality you will employ when you want to know more about an existing work that you are going to present. You are gathering sources to inform and enrich the creation of a performance. This modality often includes research skills and methodologies that feel very familiar to many musician-scholars: using scholarly resources to understand a relevant historical era or event; learning more about how a specific work fits into the overall catalog of a composer's creative output; and reading and then applying existing scholarly analyses of works are all part of the research-for-creation mode.

> "Research is studying anything that's unknown to you and potentially finding something that is also unknown to others as well. So that you're starting with this kind of question of wanting

5. Chapman, Owen, and Kim Sawchuk. "Creation-as-Research: Critical Making in Complex Environments." RACAR: Revue d'art Canadienne / Canadian Art Review 40, no. 1 (2015): 49-52. https://doi.org/10.7202/1032753ar.

> to know about something that you don't know about. You're starting to read and listen and explore various resources about that, and continuing to read and find out all that there is to know. Perhaps then stumbling onto a gap in the kind of general knowledge base and being able to uncover new information about a particular subject." **Paula Maust**

Research-from-creation

> "I had a huge misunderstanding about what music was. I never asked why music exists. Practice time took a lot, and I didn't really question why I was doing it. I also didn't question why I was playing European music when I'm obviously not European, right? Once I started asking those questions, I realized that I could approach music in a more holistic way. That it's not about producing, it's not about composing—it's about communicating. Communicating through music, communicating with music, communicating with your peers, and making your ensemble members sound great, right? Because if we all sound great, and if we're all working to make the other person sound great, we'll all be great. So that's an interesting parallel to society. But the main thing was that I did not understand the holistic nature of what music was, which today also encompasses the marketing and the commercialization of music." **Kyoko Kitamura**

Chapman and Sawchuk define **research-from-creation** as "the extrapolation of theoretical, methodological, ethnographic, or other insights from creative processes, which are then looped back into the project that generated them."[6]

If you ever wondered why a particular audience may have had a unique reaction to your work and decided to understand why, you have experienced the research-from-creation modality. Sawchuk and Chapman cite examples where creation of games or other art has created feedback data or produced other data sets that can then be used in other types of research. When user feedback from video game development informed new standards for engineers to deploy, that was an example of research-from-creation.

Research-from-creation can also be related to your practice in seemingly more practical ways. It can be important to be open to moments when you may want to think about opportunities to develop research-from-creation. For example, you might notice when you perform certain pieces of chamber music in nontraditional community settings, children from a certain age group all seem to have a shared response. This insight can help you place your observations in the context of existing research. Research-from-creation can also be purely musical: perhaps during a performance, you make a connection to other repertoire that you hadn't made before. That may spur you to explore research about repertoire that leads to a deeper understanding of the music you're performing.

Creative Presentations of Research

> "Programming is a huge part of that thread in the relatability to programming. I have a fascination, at the moment, with the Schumann symphonies and his mental health. He utilized the symphonies through what I think is one of the most devastating stories of a man who dealt with such difficult mental health. I'm excited to talk to people at the World Health Organization, which is exploring this idea of loneliness and how music can actually be a sort of light out of the dark for

6. Chapman, Owen, and Kim Sawchuk. "Creation-as-Research." https://doi.org/10.7202/1032753ar.

people in society today. So being able to correlate Schumann symphonies to the idea of mental health is something that's fascinating to me. That of course takes a lot of research—researching his letters, researching where he was when he wrote these things, what he was doing. The idea of programming and the relatability of a topic that might be pertinent to society today is another thread of why the research comes hand in hand with what I do on a daily basis." **Jonathon Heyward**

Creative presentations of research might feel like a familiar modality to some performing artists, especially those who have done advanced study in college or university settings. These research-creation projects are defined as "alternative forms of research dissemination and knowledge mobilization linked to such projects."[7] It can be tempting to say all creative presentations are the result of research. However, this modality differs from research-for-creation: Rather than informing a performance with research, the main goal in the creative presentation of research is for the performance to embody the results of your research in a non-traditional, perhaps unexpected way.

In fact, this is the modality that is most commonly used by nonprofessional or amateur musicians to communicate research findings that might have nothing to do with creative practices or performance at all. For example, Science, one of the most prestigious publishers in the physical and biological sciences, sponsors a contest called Dance Your Ph.D. every year.[8] The MAD Research Video Contest at Dartmouth College offers undergraduate students an opportunity to present their research in videos, allowing researchers to "be creative in a way that you can't do in a written thesis, poster presentation, or formal talk."[9] Harvard Law School made a musical entry in the Above the Law 7th Annual Law Revue contest that you can still view online.[10]

These expressions of research look to challenge the ways that scientific information is generally published and make it more accessible and interesting to new audiences. This modality is also being used by musician-scholars in powerful ways to present research-creation projects. One example is the dissertation work of A.D. Carson at Clemson University. Now a professor at the University of Virginia, Carson developed a 34-song album, *Owning My Masters: The Rhetorics Of Rhymes & Revolutions*, that presented his doctoral research.[11]

The emergence and acceptance of creative presentations of research at these and other forums has roots in all creative disciplines, including creative writing. Sawchuk and Chapman point out the limitations that traditional publication and dissemination systems have when making these kinds of works available.[12] However, scholars continue to assert space for these works through public performance and published artistic artifacts like albums, public art, and published music. You may need to look closely to identify these works because they are often not presented as research, despite

7. Chapman, Owen, and Kim Sawchuk. "Creation-as-Research." https://doi.org/10.7202/1032753ar.
8. "Official Rules for Dance Your Ph.D. Contest," accessed January 29, 2024, https://www.science.org/content/page/official-rules-dance-your-ph-d-contest.
9. "MAD Research Video Contest," accessed January 29, 2024, https://www.dartmouth.edu/library/mediactr/MADResearch.html.
10. Rather Read, 2015. https://vimeo.com/122237720.
11. Ashley Young and Michel Martin, "After Rapping His Dissertation, A.D. Carson Is UVa's New Hip-Hop Professor," NPR, July 15, 2017, sec. Music Interviews, https://www.npr.org/2017/07/15/537274235/after-rapping-his-dissertation-a-d-carson-is-uvas-new-hip-hop-professor.
12. Chapman, Owen, and Kim Sawchuk. "Creation-as-Research: Critical Making in Complex Environments." RACAR: Revue d'art Canadienne / Canadian Art Review 40, no. 1 (2015): 49-52. https://doi.org/10.7202/1032753ar.

containing research at the heart of their work. For example, Paul Rucker's *Proliferation* does not call itself a research project, but the video installation is clearly a creative presentation of Rucker's investigation of the U.S. prison system.[13]

The lack of acknowledgment of these works as research can present challenges for musician-scholars. Presenting these works as research may conflict with your artistic mission and your goals to communicate with your audience. Balancing your publishing, distribution, and communication around these projects can be critical in ensuring that your work can be understood by the audience you want to reach.

Creation-as-Research

> "Sometimes the arts process looks messy, and you're not quite sure where the end destination is. I have the knowledge to get children to the final destination determined by the test needs. Instead, I use research to find out what we don't know. Let's see where this journey is going to take us. What have we learned so far? What questions do we have? Let's use research as a way to inform the kind of learning that's born in the moment that comes from students' genuine interest and curiosity, and that it's still intentional. We're still defining our goal, but we're doing it collectively, and we're doing it out of our own interest and based on what we discover together through our art making. I'm not always successful at doing that in the classroom, but I would love to see our educational norms and the way that classrooms are structured be challenged by investigating creative process types of teaching." **Christina Farrell**

Creation-as-research draws from the other three modalities. It is a modality that brings to life the question "what is research" by exemplifying what happens when creative practitioners use teaching or performing opportunities as a laboratory, making research happen in real time.[14] As teaching artist Christina Farrell notes, it can also be an emergent collaborative process that happens between a musician-scholar and their audience or students.

Creation-as-research distinguishes itself from the other research methodologies by intertwining research and creative activities. This integration often results in a blend where the boundaries between research and creative processes are not always instantly clear or easy to distinguish.

These works can be most immediately recognized in instances of interdisciplinary exploration, particularly with technology. Oglala Lakȟóta artist and panel expert, Kite, demonstrates this modality in her work *Pȟehíŋ kiŋ líla akhíšoke.* (Her hair was heavy.).[15] With this work, Kite creates live performances with a 50-foot hair-braid computer interface. Kite describes the hair-braid interface as "something between an instrument and a sculpture."[16] This system is comprised of "song, power, sound, processors, machine learning decisions, handmade circuitry, gold, silver, copper, aluminum, silicon, and fiberglass."[17] In Pȟehíŋ Kiŋ Líla Akhíšoke, Kite uses the hair-braid interface to create an 8-minute work that embodies interaction between her physical performance and AI-generated texts. Kite situates this

13. Proliferation - Paul Rucker - US Prisons, 2010, https://www.youtube.com/watch?v=ySH-FgMljYo.
14. Chapman, Owen, and Kim Sawchuk. "Creation-as-Research." https://doi.org/10.7202/1032753ar
15. "Pȟehíŋ Kiŋ Líla Akhíšoke. (Her Hair Was Heavy.) (2019)," k i t e, accessed February 24, 2024, https://www.kitekitekitekite.com/portfolio/peh-ki-lla-akhoke-her-hair-was-heavy-2019.
16. Kite.
17. Kite

work in the **ontology** of her Lakȟóta heritage, stating "Lakȟóta ontology is an already established way of being, where seemingly 'inanimate' objects can be alive with spirit, and Pȟehíŋ kiŋ líla akhíšoke. (Her hair was heavy.) is an experiment in greeting that spirit."[18]

For performing musicians, creation-as-research can happen in many ways that you haven't even realized. Perhaps, as an early music practitioner, you want to explore what a composition would have sounded like in J. S. Bach's time. You can research the kinds of spaces, acoustics, instruments, and tuning that players premiering his works would have used. The research results may seem to fit the research-for-creation mode. But in this example, the experiment doesn't happen until you realize the performance in a space and recreate those specific aspects of performance. This is very different than researching the analysis of a piece to inform your performance choices. Creation-as-research is activated when you are making the performance itself a kind of research experiment.

For citizen artists engaged in educational programs, this can also be true. Perhaps, like the students in our story, you're working with a public library to present music to a local community of children who immigrated with their families. You can do preparatory work ahead of time, but you won't be able to assess and understand the impact of your work until the performance or educational interaction happens.

Every performance with Kite's sculpture-instrument or each lesson Farrell presents in the classroom is an example of **creation-as-research**. Each creative researcher tests hypotheses about their instrument or teaching methodologies to inform future work.

Introducing Our Musician-Scholars

Meet our musician-scholars: Luis, Clara, Juliano, Hyo-Eun, and Sebastian.

Together, they are applying for a Peabody Career Development grant. Our musician-scholars are passionate about engaging children in diverse communities. They hope to create musical experiences that help children discover, appreciate, and understand different cultural backgrounds.

This project was inspired by their shared passion for music; performing together not only solidified their friendship but opened a path to learning about each other's cultures.

Our group of musician-scholars wants to revisit the folk tales and folk songs of their respective cultures and re-imagine them for young audiences in the 1st through 3rd grades. They plan on sharing stories about characters, myths, and fables of their cultures, while updating them to reflect experiences that feel relevant to children today.

18. Kite

Their goal is three-fold:

- help children from multi-cultural backgrounds imagine themselves in the communities where they live,
- nourish children's learning about the other cultures in their communities, and
- do so by using music as a story-telling vehicle.

This project involves composing five songs with narrated stories to be performed at public libraries in Baltimore City. They hope to share the performance materials online and create a blueprint for other musician-scholars to develop similar projects that are relevant to local communities.

They situate their **research-creation** situated in a **research-for-creation** modality.

1-2. Dig Deeper

Reflect on the four modalities of research-creation in your research journal.

- Which research-creation modality are you already incorporating into your artistic practice?
- Which research-creation modality do you want to explore to further your artistic mission?

The Research Spectrum

With over two decades of experience in the as librarians and educators, we have worked with many college students employing various research methods and methodologies. We have consistently observed that these students not only have shared assumptions of what constitutes research but also share a common expectation for a research process with distinct starting points, intermediate stages, and conclusions.

While that would help in defining a research plan, the research process is iterative. Research also encompasses both personal and private research, as well as **praxis**, where your research and learning are applied in practice. As a musician-scholar, you often navigate through this process subconsciously. Consider your studio lessons: When your instructor shares a technique, this is a form of citation, echoing what your instructor learned from their own teachers and the lineage of instructors preceding them. You then absorb, distill, and integrate this information and apply it to your performance praxis.

> "As [a] classical violinist, just by learning from one person, I'm citing everybody that who taught them… People think they're not doing research when they are—they're already doing it." **Suzanne Kite**

It's important to realize that your research happens on a spectrum. At one end of this spectrum is the work that seems less formal: Googling a news article to verify a fact or ask an expert. At the other end is methodological research that may have formalized scholarly outputs. Much of your work as a creative researcher may happen in a space somewhere in the middle.

Leslie Ashbaugh, who was a cultural anthropologist at the University of Washington Bothell, often talked about how ordinary interactions can lead to research. In a class she co-taught with librarians on image analysis, Ashbaugh told an anecdote about how her research into beauty standards and

advertising started while in line at the grocery store. There, looking at women's magazines she observed how the cover and interior advertising affirmed a consistent set of beauty standards. This casual observation eventually led to a course that focused on visual communication in different cultures. You never know where seemingly minor research may lead you. It's important to contextualize your research for yourself. Don't underestimate the power and impact of the personal or less formal work you do; it can inform more formalized work later.

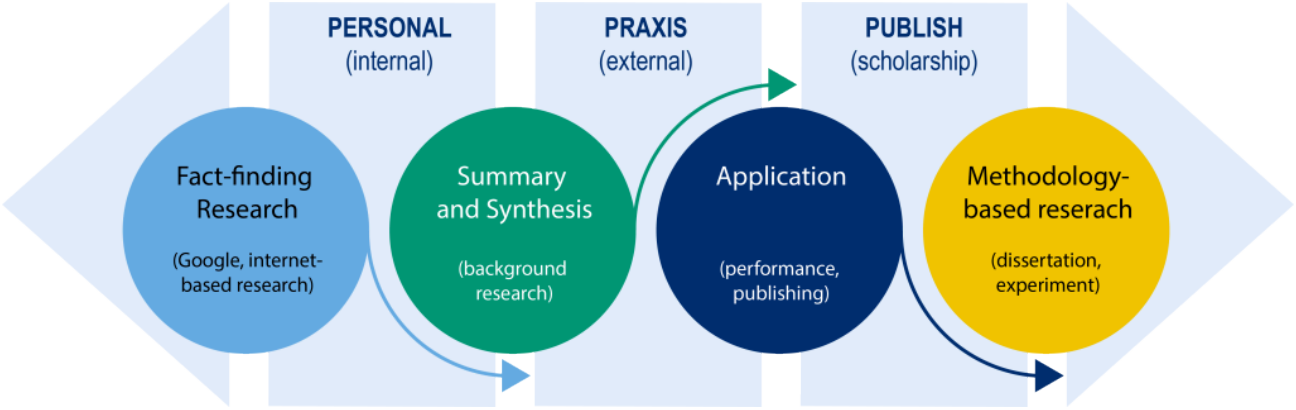

Figure 1-1. The Research Spectrum

It's also important to place the different parts of your research projects along this spectrum. If you are working on a research-for-creation project, the research will happen first. Your work will likely involve a mix of primary and secondary sources. You may never write a formal paper or give a lecture, but your discoveries may critically inform your performance and artistic choices.

The research-from-creation modality can be similar. Perhaps you will never formally share that research inspired by a creative experience, but it may provide launching points for new ideas, new projects, or even changes to your **artistic mission**. These first two modalities of research-creation may also form the basis of more formalized research projects. For music theory professor Paula Maust, one of our expert panelists, this process led her to develop Expanding the Music Theory Canon, a globally recognized website. An open-source collection of music theory examples by women and non-white composers, she has fully developed this research as a published book.[19]

By contrast, creative presentations of research can offer alternatives to more traditional modes of sharing your research. In this modality, you may be investigating the question you want to present and researching ways of engaging with this modality simultaneously. This can involve work at every point along the research spectrum. Strategically organizing those multiple lines of inquiry can help you develop an efficient but strategic research process.

The final modality, creation-as-research, happens in performance, but not without preparatory research. Your research process might entail developing a set of performance conditions or finding out how other researchers conducted and assessed similar projects. In this modality, preparing to document and assess the research that happens can be as important as the literature analysis you do before you

19. Maust, Paula. *Expanding the Music Theory Canon: Inclusive Examples for Analysis from the Common Practice Period*. Suny Press. 2023. https://search.worldcat.org/title/1410592666

conduct the research itself. It is also the modality where you need to be skilled in specific research methodologies that require training and disciplinary expertise.

Research can happen at any point in your creative process! It can also come from informal moments and interactions. It is critical to recognize when your work is research so that you can integrate that research into your performance plans.

1-3. Dig Deeper

Reflect on how your current research-creation work fits along the research spectrum in your research journal.

- What fact-based questions do you need to answer for yourself?
- What questions do you have that could be answered by summarizing and synthesizing reports or published scholarship?
- What research might inform you current repertoire, performances, or new compositions?
- List your current projects. Which modality of research-creation best describes these project? Which projects might you develop into formal, published, scholarship?

Conclusion

This chapter introduces musician-scholars to the value of research in their practice. To aid in developing research practices that integrate with artistic work, we present four modalities that can help you identify where research moments exist in your artistic work. These examples and insights gained from these four modalities of **research-creation** underscore the importance of integrating research into one's artistic mission to amplify impact and engagement. As we prepare to delve into the information life cycle in the next chapter, we carry forward the understanding that research is not a static activity confined to scholarly publications, but a dynamic process that enriches our creative expressions and connects us more deeply with our communities and audiences.

Key Takeaways

Research is an important component to your artistic practice that furthers your artistic mission.

Embrace your identity as a musician-scholar and explore where research might be implicated in your research-creation projects.

Utilize the four modalities of research-creation to identify where research will be needed in your research-creation projects.

Position your research along the research spectrum, recognizing both informal and formal research activities and their relevance to your work.

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2

UNDERSTANDING HOW INFORMATION IS MADE

Kathleen DeLaurenti and Andrea I. Copland

The Information Life Cycle

Most people in the 21st century consume information online through social media, news outlets, or pop-up advertisements. While information is more accessible than at any other point in human history, the way information is organized is highly dependent on historical approaches to how that information was created and shared. We call the model of how information is created and disseminated the **information life cycle**.

The information life cycle places information we consume on a timeline with milestones such as "Day of" or "Months after," in temporal relation to an event. The information life cycle helps us discover what kind of information and research are available about any given event over time. Where a piece of information occurs in the information life cycle shapes how we think of it as evidence or potential research material.

The graphic below identifies milestones along the information life cycle.

An interactive H5P element has been excluded from this version of the text. You can view it online here: https://pressbooks.pub/musicresearch/?p=56#h5p-4

Here is the most important thing to know about the information life cycle: WHEN we encounter a piece of information has a significant influence on the quality and quantity of information available. If we are hunting for information sources about the Grammy Awards in 2024 we will find a variety of **primary sources** on social media and in newspapers and magazines. If we are hunting for information about how scholars have analyzed the Grammy Awards and their impact on the music industry, we should seek out **secondary sources** in articles or books written and published by scholars. However, we might not expect scholars to cover the most recent awards ceremonies because of the time it takes for secondary research to be conducted and published. **Tertiary sources** like Wikipedia will summarize important facts an scholarship that has been published about the Grammy Awards over time. The information life cycle reflects how information sharing and technology work together (or sometimes not!) to create and disseminate new knowledge.

It is also important to know that the information life cycle follows Western European publishing traditions. For example, oral and nonwritten traditions of information sharing are completely absent, ignoring the ways that non-Western cultures may share information differently.

The information life cycle seems to be chronologically linear, moving from days to weeks to months to years. However, you may notice encyclopedias listed at the end of the information life cycle and wonder, "Why would it take 5 to 10 years for something to appear in an encyclopedia when Wikipedia is updated every day?"

The answer is that traditional encyclopedias are managed by large teams of editors who solicit experts to provide summaries of the scholarly landscape for readers. Some encyclopedias, like *Oxford Music Online*, focus on presenting expert perspectives from one academic discipline. The writing, editing, and publishing process is lengthy—it can take up to a decade to revise every article in a scholarly encyclopedia. This example shows how technology—in this case Wikipedia—can disrupt the traditional information life cycle. As you can see, these disruptions often impact the way we perceive knowledge production. But the information life cycle is still a helpful tool as a basic landscape for your research process.

Opportunities with new technology—such as immediately updating an entry in Wikipedia—can change audience expectations. The assumption that information can and should appear instantly influences the way information is produced and shared. However, as we discuss in Part III: Publishing Practices, business models that evolved around technology can be resistant to changing as quickly as technology

might allow. This means that being an effective researcher depends on your understanding of the production of knowledge in the past and how those practices impact the way it is produced today.

Different Kinds of Information: Primary, Secondary, and Tertiary Sources

Navigating terminology when learning about the research process can be confusing. What do you call something in the information life cycle? What should you call information sources that include tweets, magazine features or news stories, and scholarly articles? Is there a difference between a **scholarly article**, a **peer-reviewed** article, and an academic article? (No, they're all the same thing!)

In this book, we discuss information sources with consistent terminology:

- **Resource**: Any kind of information source can be a resource. We use this term when we mean "every kind of resource including popular, scholarly, and multimedia sources."
- **Scholarly article**: This is a kind of article that follows the methodological and publication traditions of an academic discipline. It might be referred to as an academic article, a peer-reviewed article, or a journal article.
- **Scholarly**: We also apply the adjective to scholarly to describe books, presentations, and practices that involve peer-review and are part of all aspects of knowledge production created by scholars.

Traditionally the information these resources convey existed as physical objects. Today, the confusing part is that we don't always interact with these resources in physical forms. This can make it hard to figure out which kinds of resources to use as evidence to support or contradict a claim we're testing as researchers. To make it even more complicated, objects such as archaeological artifacts, archival collections, and ancestral heirlooms contain valuable information that simultaneously provides contextual knowledge and illuminates individual human experiences from a specific (and possibly remote) time and place.[1]

The first way we want to think about categorizing resources is in terms of a resource's relationship to the event or phenomenon. The example of the 2024 Grammys earlier in this chapter employed the terms **primary sources**, **secondary sources**, and **tertiary sources.** These categories help us understand how specific kinds of resources situated along the information life cycle can serve as evidence in a research project.

Tertiary sources—summaries of scholarship—can help you decide where to get started or how to situate **information needs** that comprise your **research question**. Secondary sources can tell you what other scholars have discovered and which methodologies they used to engage with topics related to your research question. Finally, primary sources give you first-hand knowledge of events or music that you are studying. Examining these resources helps you form your own perspective and make contributions to the secondary source literature.

1. Michael K. Buckland, "Information as Thing," *Journal of the American Society for Information Science* 42, no. 5 (1991): 351–60, https://doi.org/10.1002/(SICI)1097-4571(199106)42:5<351::AID-ASI5>3.0.CO;2-3.

Primary Sources

Resources you find at the beginning of the information life cycle are **primary sources** that help you gather first-hand perspectives of an event or phenomenon. For example, to understand how Beyoncé's album and documentary *Renaissance* were received, you can look at music magazines and websites like *Billboard*, *Rolling Stone*, or *Pitchfork.* You can also scour sites like Twitter/X or Instagram to learn what the broader fan community was saying when *Renaissance* was released.

When looking at historical events, we can expand the idea of primary sources to items such as letters, autobiographies, or diaries left behind by historical figures. Even **scholarly articles** can be primary sources! For example, if you are interested in understanding the history of popular music research studies, then the first scholarly articles about that topic will serve as primary sources for understanding how that academic discipline was formed and developed.

Musical performances can also be primary sources. This is especially true of audio recordings of world premieres or other notable interpretations of a musical work. You are often creating primary sources when you document your **research-creation**. Depending on a researcher's question, research-creation centered in any one of the four modalities covered in the Chapter 1: What is Research? could become a primary source.

Table 2-1. Primary Sources

Category	Description
Characteristics	As close as possible to the idea, event, or topic "eyewitness evidence" Without analysis
Audience	The creator, sometimes their family, and close acquaintances (e.g., colleagues, students)
Uses in Research	As examples to support your argument As examples you compare and contrast with each other As examples that help interpret a larger problem, question, or theme
Performing Arts Examples	Manuscripts, sketches, early printed editions Scores and parts used in premiere or early performances Programs, press clippings, and reviews of performances Premiere or early sound recordings, field recordings (often the only source material for ethnography or ethnomusicology) Film footage of rehearsals, masterclasses, and performances Correspondence from composers and performers Photographs, notes on choreography, staging, costume design, and sets for dramatic works and dance
Interdisciplinary Examples	Creative works (e.g., paintings, musical manuscripts, novels, sculptures) Patents, blueprints, and government documents Field research, interviews, and physical artifacts Personal correspondence, diaries, and autobiographies News reports and reviews Photographs, videos, and sound recordings
Notes	A source which may be secondary or tertiary in another context (including an encyclopedia) could be used as a primary source, depending on the research topic. Primary sources may be scholarly or peer-reviewed.

2-1. Dig Deeper

Inventory primary sources for your current research-creation project in your research journal.

- Which primary sources are the most relevant to your current research creation project?
- Where would you situate these primary sources on the information life cycle?

- What information will these primary sources help you understand about your current research-creation project?

Secondary Sources

Secondary sources can be found a little further along on the information life cycle. These sources are the result of scholars employing a **methodology** from their discipline to analyze primary sources. Common secondary sources include scholarly articles and scholarly books. They can also help you access or understand the way other scholars have analyzed primary sources on a topic. Unlike general nonfiction, scholarly books go through a process of peer-review where other scholars assess the book for clarity, accuracy, and potential contributions to knowledge. The longer format of a book allows scholars to answer research questions that broadly address a topic, framework, or idea. Scholarly books can also help you access or understand how other scholars have analyzed primary sources, especially resources that are material and not textual. They provide analysis of music manuscripts, instruments, or artifacts that you may not be able to examine in person or that you may not have the expertise to analyze as documents.

Musicians may also produce secondary sources through performance. This is most likely to happen when you are working in the modality of research-for-creation or creative presentations of research. When working in these modalities, your performance is presenting your analyses of primary and secondary sources while synthesizing your research-creation into a source for other researchers to examine.

Table 2-2. Secondary Sources

Category	Description
Characteristics	***About*** primary sources Provide analysis, commentary, or discussion
Audience	Other researchers (and readers) interested in the topic
Uses in Research	As confirmation for your argument As a starting point for your argument, which you enhance or expand upon As a starting point for your argument, which you disagree with As a means of clarifying your argument
Performing Arts Examples	An analysis of a musical work Journal articles and books Book reviews
Interdisciplinary Examples	Scholarly articles Newspaper articles interpreting rather than reporting events
Notes	Identifying a secondary source is all about the ***context*** of your research topic Check the source's references; If a source you are using also cites your primary source, that's a clue that it could be a secondary source for your research.

2.2 Dig Deeper

Inventory secondary sources for your current research-creation project in your research journal.

- Which secondary sources are the most relevant to your current research creation project?
- Where would you situate these secondary sources on the information life cycle?
- What information will these secondary sources help you understand about your current research-creation project?

Tertiary Sources

Tertiary sources, such as encyclopedias, are not designed to add to the scholarship of an academic discipline but to summarize it. In that regard, even though Wikipedia is updated quickly, it can be limited when it presents information that is very recent. Tertiary sources rely on a rich body of published primary and secondary sources to present summaries of published perspectives from a disciplinary or general perspective. Wikipedia provides general perspectives quickly, sometimes almost immediately after information is published about an event. Gaining understanding from a specialist perspective takes time, because those perspectives need to be developed and then published. To avoid

potential inaccuracies from its quick publication cycle, Wikipedia utilizes editorial standards that prescribe what kinds of sources are required to create or add to an article on the site. This approach has proven to be incredibly valuable at providing a quickly produced general resource. However, specialized resources represent decades of research knowledge and still hold value. Older, musicology-focused encyclopedias, notably the *New Grove Encyclopedia of Music and Musicians*, remain important tools for understanding the specialized research landscape on important music topics.

New encyclopedias like Wikipedia and traditional encyclopedias like *New Grove* each have benefits and limitations. Wikipedia requires a learner to have more expertise to know what might be missing, and despite the ability to publish quickly, learners need to recognize that these articles also improve over time as more experts contribute. *New Grove* requires a learner to examine when its content was last updated and have some knowledge of how research perspectives have changed since that time. While you can be confident in the scholarly process used to create *New Grove* articles, musician-scholars still need to read closely to see what perspectives might be missing and plan for what secondary sources might be missing.

Table 2-3. Tertiary Sources

Category	Description
Characteristics	Provide overviews and context on a topic but generally no original material on that topic Often referred to as "reference sources"
Audience	Everyone! This is the original "Google search" for quick answers to everyday questions.
Uses in Research	To get background information on a topic To quickly find additional sources about a topic To learn the meanings of technical language or jargon in other sources on your topic
Performing Arts Examples	Indexes Encyclopedias Critical editions Bibliographies
Interdisciplinary Examples	Textbooks, Dictionaries, manuals, guides, and fact books Literature reviews

2.3 Dig Deeper

Inventory tertiary sources for your current research-creation project in your research journal.

- Which tertiary sources are the most relevant to your current research creation project?

- Where would you situate these tertiary sources on the information life cycle?
- What information will these tertiary sources help you understand about your current research-creation project?

Conclusion

It's evident that the information life cycle is a useful tool for situating how resources can be used as evidence or examples in your research-creation. We also define ways to classify different kinds of resources that we might use in our research. This begins to create a foundation for approaching specific research-creation projects that align with your artistic practice. In the next chapter, we'll examine historical approaches to archiving and organizing information as well as the methodologies historically used by music researchers. Gaining familiarity with these foundational concepts about how music research is made, organized, and archived help us align our information needs with the information systems we access in our research-creation work.

Key Takeaways

Use the information life cycle as a tool to understand how information is created over time.

Match your information needs to the concepts of primary, secondary, and tertiary sources. This helps you situate them in the information life cycle based on their relationship to the event or phenomenon you are researching.

Primary sources, such as social media, blogs, music manuscripts, or newspapers, provide firsthand perspectives on events. These sources help you understand immediate reactions and contexts.

Secondary sources, such as scholarly articles and books, provide in-depth analyses and interpretations of events or phenomena. These sources give you to access scholarly discussions and application of different methodologies.

Tertiary sources, including encyclopedias and indexes, provide summaries and general contexts. These are useful for background information and quick reference.

Be aware of the information life cycle's limitations, particularly its linear, Western bias and the exclusion of oral traditions. This awareness encourages a more inclusive and critical approach to research.

Media Attributions

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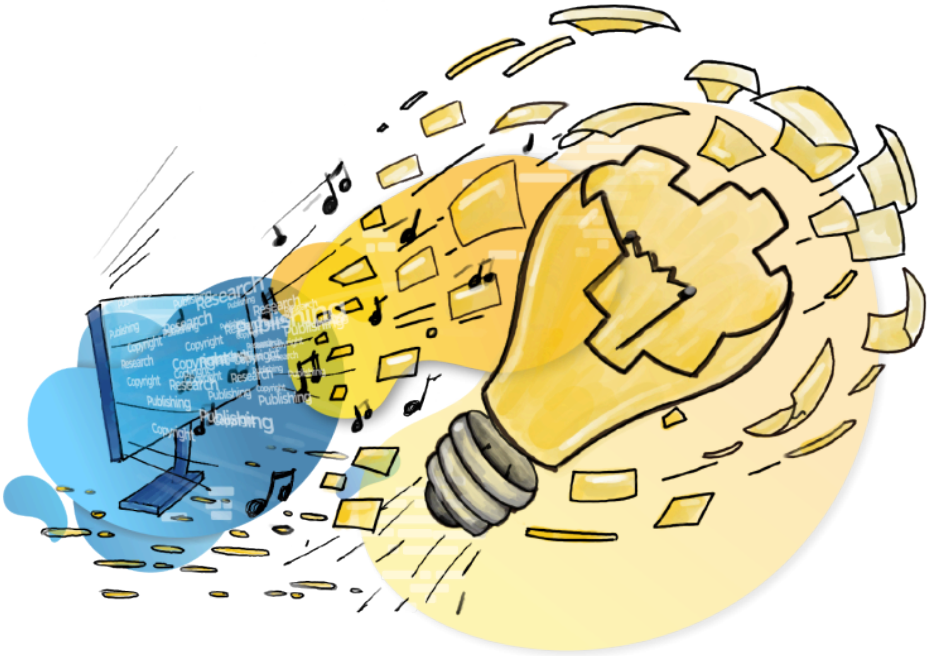
3

ARCHIVING AND ORGANIZING INFORMATION

Kathleen DeLaurenti and Andrea I. Copland



Information Organizations

So far, we have discussed research modalities; explored the information life cycle; and defined three kinds of sources to help you plan and organize your research strategically. You are equipped to locate your research in a **research-creation** modality and articulate potential research questions. This can help you decide what kinds of **primary**, **secondary**, or **tertiary** sources you need and how to map that to the **information life cycle**.

Next, we cover the ways institutions have collected and organized these resources as well as the different **methodologies** that music researchers have used to create traditional scholarship. When you understand how information has been collected and organized, you can more efficiently access the resources you need for your work. Being familiar with historical and emerging methodologies benefits **musician-scholars** in two ways: you will be more efficient when searching for published research and make better informed decisions about which methodologies you may want to use in your **research-creation**.

Archives and Institutions

"Archive" is a noun and a verb. An archive is an entity within an institution that collects documents and objects of informational value. As a noun, an archive usually contains information that provides evidence about an institution's history or people. Archive is a verb in the sense that it also describes the work that is done to preserve evidence for posterity and to organize or arrange it in an unbiased way for future access.

It is essential to acknowledge that institutions like universities, museums, archives, and libraries are largely enterprises of Western culture. Advocates for these institutions cite the preservation of—and visibility or access to—information as net positive justifications for their continuation. However, some institutions that deal in cultural heritage also have a complicated history of seizing, excluding, and even erasing valuable information that exists outside of text and artifacts.

Because of this complicated history, we sometimes need to think about primary source evidence that might exist in the information life cycle but may be difficult to find through institutional resources. You might encounter a barrier because of the way that information is described: Institutions have developed practices to catalog information to help make these resources more discoverable. However, those practices may ignore cultural or communal approaches to knowledge production and preservation. A disconnect can emerge when an institution archives a community in one way, and yet that community collects, describes, and preserves its culture in other ways. Resources can become challenging to find; you may need to connect directly with a community to continue your research process.

Another phenomenon that can interrupt your ability to access primary sources as evidence is **archival silence**, which occurs when there is "a gap in the historical record resulting from the unintentional or purposeful absence or distortion of documentation."[1] As a researcher, you may need to consider whether this silence may be addressed through community archives that are built and maintained outside of institutions.

For musician-scholars, this aspect of the research process can be complicated. These resources may only exist as evidence in audio recordings or oral traditions shared among community members. This can be especially true in musical traditions that live on through oral and communal creation of music that may not be notated or recorded.

1. "SAA Dictionary: Archival Silence," accessed September 26, 2023, https://dictionary.archivists.org/entry/archival-silence.html.

3-1. Dig Deeper

Examine the archival voices that you want to include in your research-creation project.

- Which archival voices contribute critical information to your research-creation project?
- Which archival voices do you want to learn from that may be difficult to locate?

Organizing Knowledge and Institutions

Learning how information has been organized throughout history reveals the underlying systems that regulate the presentation and location of research in **library catalogs**, **indexes**, **research databases**, and **search engines**. There are vast quantities of information to be preserved, organized, and used. This results in the adoption of systems that are deemed most effective, shaped by the needs and insights of those closely involved in the process. Today, more people have access to education and research resources than ever before. Despite this increased access, a significant amount of influence and power remains with academics, librarians, and publishers. These three groups play a key role in how information is made available and disseminated.

The ways that information is organized within institutions is subject to the respective limitations of various Western intellectual traditions. The most fundamental component of any collection is the catalog, or "list" of its contents. The word "catalog" itself has Greek roots in *kata* (by) and *logos* (reason), which indicate the word's application: organization by reason.[2]

First developed in the 7th century B.C., catalogs increased in complexity as major cities and their collections of records grew throughout Mesopotamia. As various cultures found their way to the fertile land between the Tigris and Euphrates rivers, each civilization was compelled to preserve their writing and diverse cultural histories. Multiple versions of the same texts began to emerge along with transactional records. As resources were copied and distributed with increasing frequency, it became necessary to discern the different versions of these documents.[3] While the organization of the ancient Near East's information resources grew more sophisticated, Western Europe's practices languished as the continent suffered significant intellectual losses during the spread of the bubonic plague (known as the "Black Death") in the mid-14th century.

Later, the United States established its first research collection, the Library of Congress, in 1800. Following the War of 1812 and the resulting burning of the first Library of Congress in 1814, Thomas Jefferson sold most of his private book collection to Congress in 1815, claiming "There is in fact no subject to which a member of Congress may not have occasion to refer."[4] Having inadvertently established the mission for the Library of Congress, Jefferson enclosed several notes on the organization of his collection, which he hoped would be preserved by Congress. Using Lord Francis

2. Ruth French Strout, "The Development of the Catalog and Cataloging Codes," *The Library Quarterly* 26, no. 4 (1956): 254–75, https://doi.org/10.1086/618341.
3. Strout.
4. Wayne A. Wiegand and Donald G. Davis, Encyclopedia of Library History, Garland Reference Library of Social Science; Vol. 503. (New York: Garland Pub., 1994).

Bacon's "table of science," he employed a hierarchical arrangement by subject: Memory (History), Reason (Philosophy), and Imagination (Fine Arts).[5] From there, Jefferson outlined an organizational scheme within each subject chronologically.

Today, this organizational scheme has been expanded and refined into the Library of Congress Classification system, or LCC, which has expanded with the help of thousands of information practitioners. When you visit academic libraries with large and varied collections, you see these LCC numbers, called **call numbers**, on the spine of books and musical scores on the shelves. This system organizes all of the physical materials in a library by subject. This ensures that when you use the call number for a biography of Robert Schumann to find that specific book on the shelves, you'll see that biographies of Clara Schumann are shelved nearby.

In addition to this numbering system, which tells us which order things appear on the shelf, many libraries around the world also use the Library of Congress Subject Headings. This distinct system provides specific sets of keywords that are used to describe information and a series of rules to apply them. We explore how to use this keyword system in Chapter 5: Practical Search Strategies.

Navigating the Research Landscape

Luis is ready to get started collecting source material for the group's project. He's been given a list of folk songs and folk tales recommended by each of the group members.

Luis grew up hearing folk tales and folk songs from his Dominican parents. He is excited to learn what archives and library collections might have to teach him about how these oral traditions have been documented. Luis starts to form some plans for getting started. First, he will identify archives in the United States that might contain collections related to the different cultures of each group member. He also plans to interview his fellow musician-scholars to find out what kind of archival silences each group member has experienced.

Methodologies and Institutions

In this section, we present a range of **methodologies** used in music research, illustrating their interdisciplinary nature and how they evolved over time. Methodologies such as historical musicology, ethnomusicology, popular music studies, music psychology, performance practice, and action heritage research are covered. Each methodology can provide unique insights into your research questions.

5. Wiegand and Davis.

They also can provide a window into how music integrates **methods** and methodologies from multiple disciplines in its research practices.

We also introduce ideas about how methodologies can create or maintain power structures in the study of music, emphasizing the historical organization of information and its influence on modern research systems. Methodologies in music have developed over a 150-year history; some of these methodologies can still reflect the power structures in existence when music researchers first introduced them.

However, new methodologies, such as action heritage research challenge these traditional power structures. In musicology, researchers are adopting action heritage research practices that seek to disrupt traditional research paradigms. This approach is pivotal in challenging existing power dynamics and advocating for a more inclusive and diverse scholarly dialogue. By understanding and applying these methodologies, you can enhance your research-creation projects; acknowledging and addressing the biases present in scholarly resources; and recognizing the influence of power structures in the study of music.

Music Research Methodologies

A methodology is broadly understood to be the "practices, procedures, and rules used by those who work in a discipline or engage in an inquiry."[6] There are some methodologies regularly used in music research that are helpful to know. You'll see these methodologies in **scholarly books** and articles published specifically in music research. Being able to recognize these methodologies in research will help you start to think about which methodologies might be useful in your own work.

For generations, music research has been dominated by studying scores as texts and doing strict historical investigation–all methods that mirror the traditional methodology of academic historians. Music research also borrows from literary practice. Reading a score can include multiple literary methods: technical dissections of the mechanics of music (such as Schenkerian analysis), critical scholarly editions of performance pieces, or the application of specific literary techniques that invite scholars to read alternate meanings between the musical lines in a score. Traditional musical study has also centered on the historical facts and circumstances of music making. It involves interpreting culture, connecting events to contexts, and tracing performance critiques over time.

We will examine some broad areas of music research that utilize specific methods to analyze resources we identified in the information life cycle. Many of these borrow techniques from other disciplines, like history, literature, and art history. In many ways, music research is an inherently interdisciplinary field. The methodologies presented here do not constitute an exhaustive list, but they represent some of the most common approaches to music research that you'll encounter.

Historical Musicology

Historical musicology uses methods that are closely related to history. It examines the history of music composition, performance, and **reception history**. Traditionally, historical musicology focused exclusively on the study of Western art music. The study of non-Western music is understood to have

6. "The American Heritage Dictionary Entry: Methodology," accessed December 11, 2023, https://www.ahdictionary.com/word/search.html?q=methodology.

begun with Fétis' *Histoire de la musique* (1869–76).[7] Historical musicology is deeply concerned with archival records and primary sources, including manuscripts, diaries, news reports, and personal letters. Scholars use historical musicology to understand the information contained in these primary sources or place them in historical context.

An example of historical musicology is Gayle Murchison's book *American Stravinsky: The Style and Aesthetics of Copland's New American Music, the Early Works, 1921-1938*.[8] Dr. Murchison's approach uses historical musicology to examine archival sources that give insight into the influence of Igor Stravinsky and other European music traditions on Aaron Copland's music. She uses this research to analyze how Copland American-ized these Western classical traditions to shape his own unique compositional voice.

Ethnomusicology

The Society for Ethnomusicology describes ethnomusicology as the study of music in its social and cultural contexts. Ethnomusicologists examine music as a social process to understand the nature of music and its meaning to practitioners and audiences.[9] One point of differentiation between ethnomusicology and historical musicology is the use of **fieldwork**—the method of observing and participating in music making and related activities. Ethnomusicologists favor community engagement over or in combination with primary source analysis.

For example, in her book *Women, the Recited Qur'an, and Islamic Music in Indonesia*, Dr. Anne K. Rasmussen explores the role of women reciting the Qur'an in the urban Indonesian soundscape.[10] Rasmussen studies with Indonesian women who play an important role in these recitations to understand the ways that religious practice and musical performance intertwine in their culture. Her observations and collaborations with the community help the reader understand the role of relgious-musical practice and tradition in modern Indonesia.

Popular Music Studies

Popular music studies emerged in the 1980s as music, social sciences, and humanities scholars identified a need for a scholarly community that focused specifically on the study of popular music. *Popular Music Studies*, the first journal in the field, seeks to cover "all aspects of the subject—from the formation of social group identities through popular music, to the workings of the global music industry, to how particular pieces of music are put together. The journal includes all kinds of popular music, whether rap or rai, jazz or rock, from any historical era and any geographical location."[11] The source material for popular music studies is often the same as historical musicology, but it increasingly involves fieldwork and methods from ethnomusicology as well.

7. "Musicology," Grove Music Online, accessed December 11, 2023, https://www.oxfordmusiconline.com/grovemusic/display/10.1093/gmo/9781561592630.001.0001/omo-9781561592630-e-0000046710.
8. Gayle Murchison, *American Stravinsky: The Style and Aesthetics of Copland's New American Music, the Early Works, 1921-1938* (University of Michigan Press, 2012), https://doi.org/10.3998/mpub.105530.
9. About Ethnomusicology - Society for Ethnomusicology," accessed December 11, 2023, https://www.ethnomusicology.org/page/AboutEthnomusicol.
10. Anne K. Rasmussen, *Women, the Recited Qur'an, and Islamic Music in Indonesia*, ACLS Humanities E-Book (Berkeley: University of California Press, 2010), http://hdl.handle.net/2027/heb.31651.
11. "Popular Music," Cambridge Core, accessed December 11, 2023, https://www.cambridge.org/core/journals/popular-music.

Dr. Lauron Kehrer, one of our expert panelists, recently released their book *Queer Voices in Hip Hop: Cultures, Communities, and Contemporary Performance*.[12] Dr. Kehrer utilizes many methods in the book: They combine musical, textual, and visual analysis with traditional methods of reception history. These methods allow them to retell the story of queer involvement throughout the history of hip hop.

Music Psychology

A relatively new field, music psychology is concerned with "the processes by which people perceive, respond to, and create music, and how they integrate it into their lives."[13] Scholars in this field engage with the variety of ways that music is interpreted by the brain, ranging from cognitive perception of pitch to psychological and physiological responses to rhythm, tempo, instrumental timbres, and other aspects of music. The use of **empirical research** sets music psychology apart from the more humanities-based music methodologies. Rooted in empirical research, these studies often derive their design from psychology and employ statistical analysis in determining results. Researchers in this discipline can replicate previous designs or present new designs that are contextualized in previous research.

Researching the perception of 12-tone music, Dr. Jenine L. Brown designed an experiment to expose people with no formal music training to 12-tone melodies.[14] Her initial findings indicate that listeners do not need the context of a tonal scale to learn patterns of intervals. Dr. Brown's research uses methods from statistics to analyze the findings in her experiment.

Performance Practice

Performance practice often feels the most familiar to novice musician-scholars. This area of music research is concerned with understanding how music written in the past was performed at the time it was written. This can involve many ways of exploring performance from a research-creation lens: reading a treatise on bel canto singing from the 18th century can embody research-as-performance, but performing using specialized instruments in places that acoustically match where a work was premiered can be **research-as-creation**. Performance practice research often employs the study of primary resources in archives and application of music theory analysis techniques.

In *The Songs of Fanny Hensel*, Stephen Rogers[15] presents the first complete critical analysis of the 249 songs written by Fanny Hensel (1805-1847) in her lifetime. Hensel, regularly still referred to by her maiden name of Mendelssohn, has often been cast in the shadow of her famous brother and his music. Examining Hensel's music as a distinct body of work with a unique approach to composition, Dr. Rogers' research provides a guide for historically informed performance, helping performers understand the context in which the music was composed and performed.

12. Lauron J. Kehrer, *Queer Voices in Hip Hop: Cultures, Communities, and Contemporary Performance* (University of Michigan Press, 2022), https://doi.org/10.3998/mpub.11306619.
13. Siu-Lan Tan, *Psychology of Music: From Sound to Significance* (Hove, East Sussex [England]; New York, NY : Psychology Press, 2010), http://archive.org/details/psychologyofmusi0000tans.
14. Jenine L. Brown, "The Psychological Representation of Musical Intervals in a Twelve-Tone Context," *Music Perception* 33, no. 3 (February 1, 2016): 274–86, https://doi.org/10.1525/mp.2016.33.3.274.
15. Rodgers, Stephen, ed. *The Songs of Fanny Hensel*. (New York, NY: Oxford University Press, 2021). https://search.worldcat.org/en/title/1197722847.

The methodologies of historical musicology, ethnomusicology, popular music studies, music psychology, and performance practice have evolved over time and largely position scholars as experts studying documents, culture, and performance. In many of these fields results are generally shared through **peer-reviewed** conference presentations, **scholarly articles**, and **scholarly books**.

Just as archives prioritize collecting some voices and can sometimes misunderstand or lose the context of a collection, these methodologies can unintentionally create power structures that limit or prevent some voices from being heard in scholarship. Archives are not always inclusive, and methodologies that rely on archives are going to favor stories about materials that are well-represented in collections.

Ethnomusicologists have long wrestled with ethical approaches to fieldwork. For example in Bruce Jackson's chapter "Being Fair" in his 1987 book *Field Work*[16] and more recently in Audra Simpson's 2007 essay "On Ethnographic Refusal."[17] In response to the question "Who owns the folklore?" Jackson answers "Not you or me, that's for sure."[18] These scholars acknowledge that early research in the field situated the researcher as expert and music communities as subjects in scholarly publications. These historical power structures that have influenced our published and archival research collections can present challenges for musician-scholars, especially those who want to learn how to work with communities different than their own.

3-2. Dig Deeper

Examine which methodological approaches might inform your current research-creation project.

- Which methodological approach could help you understand topics or issues related to your research-creation project?
- Applying methodologies requires training in the methods they apply. Which methodology would you want to seek training in to advance your artistic practice?

Action Heritage Research

The action heritage research movement presents a new methodology that challenges conventional academic practices and attempts to foster a more inclusive and democratized approach to knowledge creation. Proposed by Robert Johnston and Kimberley Marwood, the action heritage framework is characterized by an approach focused on collaboration between researcher and community. Johnston and Marwood define action heritage research as "undisciplinary research that privileges process over outcomes, and which achieves parity of participation between academic and community-based researchers through sustained recognition and redistribution."[19] This definition underscores the prioritization of the research process in this methodology. Recognizing that all participants bring

16. Bruce Jackson, *Fieldwork*, Illini Books edition (Urbana: University of Illinois Press, 1987), https://archive.org/details/fieldwork0000jack.
17. Audra Simpson, "On Ethnographic Refusal: Indigeneity, 'Voice' and Colonial Citizenship," *Junctures: The Journal for Thematic Dialogue*, no. 9 (2007), https://junctures.org/index.php/junctures/article/view/66.
18. Jackson.
19. Robert Johnston and Kimberley Marwood, "Action Heritage: Research, Communities, Social Justice," *International Journal of Heritage Studies: IJHS* 23, no. 9 (2017): 816–31, https://doi.org/10.1080/13527258.2017.1339111.

expertise to the research process, action heritage researchers also reframe the relationships among a "researcher" and a "community."[20]

By examining the way that archives, organizational approaches, and traditional methodologies have developed over time, we also expose ways that these institutions and systems can exclude some voices. By highlighting the importance of community narratives and the opportunity for new discoveries through localized research, action heritage research confronts these fixed assumptions and entrenched perceptions about how we preserve, organize, and analyze history. This approach fundamentally alters the traditional research paradigm: Rather than isolating a single researcher with artifacts in an archive, it fosters collaboration between researchers and communities. This collaborative effort is essential for generating a comprehensive understanding of heritage that reflects diverse perspectives and experiences.

Examining how information is organized helps us understand how information is presented to us as researchers. Familiarity with multiple methodologies can help you understand which scholarly resources can inform your research-creation projects. In addition, knowing that some researchers are challenging scholarly traditions that limit participation of some communities prepares you to interrogate scholarly resources. You can assess whose voices might be missing and open a path for including those voices in your work.

IBreaking Down Your Research Topic

Understanding different methodologies helps Luis start to understand some of the diverse research perspectives that scholars have used to understand folk songs from different cultures. First, he plans to locate research that uses ethnomusicological methodologies. Because his fellow musician-scholars want to communicate traditions from multiple cultures in their group, he also wants to make sure his research takes an ethical approach to understanding the communities that this music comes from. Luis will be especially interested to study participatory methodologies in ethnomusicology and other related disciplines.

Conclusion

The institutional archive remains the main venue for research using primary sources in music. Institutions, such as universities, city halls, library branches, publishing houses, concert halls, and

20. Johnston and Marwood.

production companies, house archives that contains historical records of their organizational history and local communities. University archives continue to grow particularly quickly, as professors and musicians donate archival collections of their professional lives with the hope that their contributions to the intellectual and local community will be preserved. However, the nature of archives being separate from the communities who create the cultural history they preserve creates inherent power structures that impact what archives deem appropriate to collect, the ways they interact with communities, and how that information is organized and preserved.

The research community increasingly recognizes institutional structures that have historically limited the scope of inquiry, particularly in the field of music research. Music research, traditionally focused on the study of Western classical music, is expanding to engage with interdisciplinary methodologies and ideas from many disciplines in the humanities and social sciences. Contemporary scholars in musicology are adopting methods that examine structures of power in research and expanding the diversity of voices represented in research-creation.

Key Takeaways

View archives as both collections of valuable records and the active process of preserving and organizing these records for future research.

Examine how Western cultural practices, as well as academic and institutional power dynamics, influence preservation, organization, and access to information within institutions. This prepares you to investigate gaps in historical records due to missing or distorted documentation and explore community archives for alternative perspectives.

Familiarize yourself with various music research methodologies such as historical musicology, ethnomusicology, and performance practice in order to recognize which methodological approaches can help you interrogate your research questions.

Seek out research based in modern methodological approaches like action heritage research that emphasize process and equitable collaboration between academic and community researchers.

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4

PREPARING TO SEARCH

Kathleen DeLaurenti and Andrea I. Copland

Getting Ready to Search

It is important to understand the **information life cycle** and the kinds of **resources** available to you as a **musician-scholar** before you get started with your **research-creation** project. It is often tempting to open your favorite **search engine** and ask it questions the moment you have a research idea. While that works well when you want to know movie times, which musical performances are happening this weekend, or find a recipe, it can be frustrating when you take that same approach for your research-creation projects. In this chapter, we will focus on the search process and how to successfully plan a search strategy for a formal research-creation project.

The increasingly inclusive and interdisciplinary nature of music research means that in addition to collections of music sources such as scores, letters, and concert reviews, we must navigate multiple information systems across disciplines. It can seem intimidating and you might feel like you need to be an expert in disciplines outside of music. But you can develop flexible workflows and searching methods that allow you to bring expertise from multiple academic disciplines into your work.

To streamline your search process, begin by clearly identifying your **information need**. While a Google search might seem straightforward, fully understanding the questions you aim to explore often requires deeper reflection. Articulating your information need requires more than just posing a question to a search engine. You must thoroughly examine the need you identified; discern any underlying aspects; clearly define it in comprehensible terms; and then effectively translate this need for an information system.[1]

To gain a better understanding of your **information need**, ask yourself: What kind of information answers your questions? How will it serve as evidence in your argument or offer examples of what you want to understand? Then revisit the **information life cycle** to find where the resources that contain this information exists.

The development of your central research question is itself a significant **information need**. Yet, segmenting this central question into smaller, more manageable inquiries can enhance the efficiency of the research process. Consider the analogy of constructing a house: Trying to build without knowing how to frame a wall would be daunting. Similarly, tackling a complex research question without breaking it down into manageable tasks and questions can feel overwhelming. By addressing each component of your research question step by step, the process becomes more approachable and systematic, akin to building a house from the ground up with a clear blueprint.

In this process, it's crucial to remain vigilant about potential biases in scholarship. Reflect on whose voices and narratives have been included and whose have been marginalized or excluded. Segmenting your approach to your research prevents you from being overwhelmed and prompts a critical evaluation of existing information sources, encouraging you to consider which perspectives are prioritized and which may be absent from existing scholarly discourse and information sources. By acknowledging and seeking out underrepresented perspectives, you contribute to a more equitable and comprehensive understanding of your subject matter.

As we move through this chapter, we'll examine the history of search engines to better know how to utilize them in our search strategies. Once you know search engine basics, you can begin to look at your research question and practice developing a search strategy.

Why Is Searching Hard?

Before the year 2000, easy online access to research was something people dreamed about. Libraries have held **card catalogs** since the French Revolution.[2] For hundreds of years, these drawers of cards

1. Robert S. Taylor, "The Process of Asking Questions," *American Documentation* 13, no. 4 (1962): 391–96, https://doi.org/10.1002/asi.5090130405.
2. The Library of Congress, *The Card Catalog: Books, Cards, and Literary Treasures* (Chronicle Books, 2017).

helped library users find information about every book in a library without having to aimlessly sort through the shelves, hoping to stumble upon the right book or musical score.

Libraries were early adopters of computer technology too. The first online library catalog was launched in the United States at the Ohio State University in 1976, long before many Americans had access to home computers.[3] As early as 1996, while Google was still a research project at Stanford University, Christina Borgman was critiquing the inadequacies of these early online search portals.[4] The first online catalogs required expert searchers who employed specialized terms and syntax to design a search to produce good results. While you could use online catalogs while sitting at a computer terminal, these catalogs generally reproduced the limitations of card catalogs. You could only search the same limited set of information about a book or article that you found on a card. Compared to Google's ability to search every term on a website, this must seem like a profound limitation. Why didn't library catalogs search every word in a book?

Today, it can be even more confusing to understand why **library catalogs**, **research databases**, and **indexes** as well as **search engines** such as Google, work differently. Musician-scholars who are still developing their research practice often want to rely on Google as their main search tool. And why not? Google doesn't require a login, seems easy to use, and returns millions of results. Google was designed to make users feel comfortable with the tool so it could generate clicks and increase ad revenues, so it's no surprise that many people use it as their go-to search tool. Although Google can be very useful for some kinds of research, it can make your research process take longer. One thing it does not do well is understand the purpose of your search. Google treats all searches the same, whether you're trying to look up the weather or analyze a piece of music.

Unlike Google, specialized research tools, such as Music Index, the Répertoire International de Littérature Musicale, or Oxford Music Online, are built specifically to help researchers efficiently find the kind of music research-related evidence they need. These tools are not limited to music: Every academic discipline has developed tools to make searches easier that rely on terminology and methodologies in these fields. Understanding how to evaluate and choose a search tool and to use that knowledge to search effectively can help you expand your list of databases beyond Google and develop a more efficient process by going to the best search tool first.

3. Christine L. Borgman, "Why Are Online Catalogs Still Hard to Use?," *Journal of the American Society for Information Science* 47, no. 7 (1996): 493–503, https://doi.org/10.1002/(SICI)1097-4571(199607)47:7<493::AID-ASI3>3.0.CO;2-P.
4. Borgman.

Challenges with Searching

Hyo-Eun is working with Luis on the background research for their research-creation project. Getting started, she is feeling a little overwhelmed. With so many ideas to consider, she's unsure how and where to begin. Hyo-Eun decides that thinking through the kinds of available search tools might be one way to organize her thoughts. She tried Googling her topic, but most of the results were just Wikipedia entries of information she already knows. Maybe there is another search tool that can help her find richer resources more quickly.

Understanding Search Tools

The homepage of your favorite **search engine**, whether it's Google, Baidu, or Naver, is compelling. It promises to answer any question you ask! And in our daily lives, these tools can be incredibly powerful. With a few clicks, we can get directions to almost anywhere in the world, check movie times at local theaters, and serve up playlists and performances. However, search engines are not always the best place to start. Knowing which search tool to use with can help you find better resources more quickly and build a strategic, efficient search process.

Think about choosing a search tool the same way you think about shopping. If you need to stock up on necessities, a large chain grocery store will probably have what you need. You will find an impressive array of different kinds of food, staples, and cleaning supplies. However, if you need an ingredient to make a dish that is not available at your local grocery store, you may have to make a separate trip to a store that specializes in that kind of ingredient or cuisine. Specialty items may be harder to get where you live. Sometimes you might need to special order them online from another state or country.

Gathering information sources should prompt the same kind of choices. Google serves as a convenient general store. It tries to fulfill a wide range of needs, but it probably lacks the depth or nuance required to pinpoint results that precisely match your research needs. On the other hand, libraries provide access to a selection of search tools that, while potentially more challenging to locate and use, reward your efforts with richer and more relevant materials, just like high-quality ingredients enhance a gourmet dish.

Let's examine four kinds of search tools to understand their differences and benefits: **search engines**, **research databases**, **indexes**, and the **library catalog**.

Search Engines

A **search engine** is an online search tool that **crawls** the open internet for information gleaned from websites. Search engines were probably the first search tool you ever learned how to use. Today, Google is one of the most popular, but it's not the only one. Others, like Bing, Naver, and Baidu, are also commonly used. While it's tempting to think that all information on the internet is available through a search engine, that's unfortunately not true. Information provided by subscriber-only online services may be missed by a search engine or blocked altogether. Websites can even include computer code that prevents search engines from gleaning their content.

Search engines in the United States are commercial enterprises. They generate profits from advertisements embedded in their search results and on user-generated content platforms that they may own. This profit motive incentivizes these companies to make design decisions about how the search engine works that maximize profits.

For example, Google owns YouTube. As a content creator, you may generate revenue from ads placed on your original content that you post to YouTube. Recent data shows that as of 2016, Google keeps $45 for every $100 generated from content that you post on YouTube.[5] Google has an economic incentive to ensure you're happy with your search results, so you may not have realized that there are other factors that influence the development of the tool. However, Google also has an incentive to display search results in a way that maximizes ad revenue for companies that buy ads. That doesn't mean that Google allows companies to pay for higher results, but this profit motive can lead to things like prioritizing e-commerce results where advertisers are relying on a return on the investment from their advertising dollars. In music, that means that search results such as links to streaming, merchandise, or tickets will likely appear at the top of the list.

Search engines also search the full text of any website that will allow them to crawl the site, including the **metadata**. This means a search engine can use all the information about that website and all the information published there to determine whether it ranks high or low in search results. Collecting this information also impacts the way Google processes your search terms.

Google's search **algorithms** are designed to perform **fuzzy searches**, which means they go beyond the exact words or phrases entered in the search bar. These algorithms compare your search terms with a range of common and related terms to broaden the scope of the search. A fuzzy search can be advantageous when you are unsure of the correct terminology or if you're using colloquial or outdated language. However, fuzzy searches can become a hindrance when your search is for something specific.

For instance, if you're looking for a baker who sells quality dessert pies, Google will likely return results for any dessert-related establishment, which is only helpful if the best pies can be found at a local bakery rather than a dedicated pie shop. If Google's search algorithm assumes you will be happy with any dessert, you will receive more results. The algorithm also assumes those additional options are helpful.

Conversely, searching for the term **cookies** in Google with the intent of finding information about digital tracking cookies may lead you to a long list of local bakery listings instead of the technical insights you need about cookies that track web activity. Because Google is generally going to prefer

5. Werner Geyser, "How Much Do YouTubers Make? - A YouTuber's Pocket Guide [Calculator]," Influencer Marketing Hub, November 27, 2016, https://influencermarketinghub.com/how-much-do-youtubers-make/.

e-commerce activities, even though it has both kinds of cookies indexed in its search engine, the algorithm will assume you want to order some chocolate chip cookies and not research web technology. Sometimes a search engine's assumptions about your needs can complicate rather than simplify your quest for information.

Comparing Google and Google Scholar Results

Even within different Google tools, search can behave differently. As an example, we can search for the K-pop group BTS (Bangtan Sonyeondan/방탄소년단) on Google's homepage to see what kind of results it presents. The search results offer background information from the band's website, Wikipedia articles, and links to other K-pop fan sites. Google also provides links to band members' social media and points to official services, like Spotify and YouTube. As we scroll down the page, we will start to see profiles and articles from magazines like *Teen Vogue* and news sites like CNN. Further down the list of results, websites focused on K-pop gossip sites and tabloids proliferate.

Therefore, the question arises: What's missing? The current search results don't offer insights into BTS' popularity or analytical perspectives on their music. They also don't provide research related to BTS' fan engagement strategies, merchandising, or role as diplomatic envoys to the United Nations. Most search engines can easily furnish information about the band members, their most popular songs, and ways to purchase merchandise—which, incidentally, generates ad revenue for Google—but simple a Google search fails as tools for in-depth research.

However, a search with Google Scholar results in pages of scholars in different disciplines who have explored some of the in-depth research topics posed above. You might wonder why these results are separated. While we don't know for sure, it's likely because academic publishers are not buying Google ads. Adding Google Scholar results to the main search engine would lead to fewer people clicking on profitable ads—Google's primary source of revenue. While it does aspire to be the best general search engine, every change to your first page of results is designed to make more revenue for Google and its ad partners.

Google excels at providing foundational knowledge and background information on a topic, yet its effectiveness diminishes when delving into more specialized research. It can be disappointing when a tool you use every day falls short in meeting your research needs. However, later in this chapter, we explore strategies to maximize Google's utility for research purposes, ensuring you get the most out of its capabilities.

4-1. Dig Deeper

Try searching your favorite artist or musician on Google.

1. Do the top results provide background information, retail or ad-supported media, or scholarly information?
2. What differences do you notice when searching for the same artist in Google Scholar?

Research Databases

A **research database** is a resource that organizes a set of materials that you can query through a search. Research databases generally collect a set of scholarly articles or books by academic discipline or publisher. These tools can be expensive and may only offer subscriptions to libraries and academic institutions. Sometimes they'll allow Google Scholar to index their **metadata** so that you have the option of purchasing a single scholarly article, but that can be expensive. Prices generally range from $29.99 to $49.99 per article. For those lucky enough to have subscriber access, these databases do search the full text as well as the metadata. This explains why your search terms can appear in the body of the article, the title, or the abstract.

Unlike Google's search engine, Google Scholar works much less like a search engine and more like an academic database. It has a narrowly defined scope limited to scholarly articles, federal court decisions, and patents. Rather than trying to answer any question by looking at information on every web page, Google Scholar is focused on results from academic publishers and open-access repositories.

When we search for BTS in JSTOR, we find around 10,000 scholarly articles, book chapters, and research reports. By default, JSTOR presents the sources it deems most useful first, like Google. Searching by date reveals the oldest resources are from 1923, which are not relevant to our search, since BTS has only been active since 2013—a gap of nearly a century. We also get results in more than 40 languages, including English. But because the authors have access to many JSTOR collections, we find results in many subjects beyond music. Unlike Google's results—which include dynamic websites, static online articles, and multimedia—the kinds of resources you find in JSTOR mirror the resources researchers used in print before the advent of the internet.

4-2. Dig Deeper

Practice evaluating different search tools. Search JSTOR for your favorite artist.

1. How do search results on JSTOR differ from search results on Google?
2. How does it compare to a Google Scholar search?
3. Does JSTOR let you fully sort and view search results without a subscription log in? What kind of information about JSTOR results can you learn without paid access?
4. Check your local library to see if they provide subscription access to JSTOR. What are the different ways that JSTOR and Google Scholar allow you to filter or sort your search results?

Indexes

Indexes can be the most difficult resource to understand, but they remain an incredibly important resource to access research that is not available in a digital format. While historical research may not be important for particle physicists or medical researchers who need cutting-edge information to do their work, performing artists and musicians can benefit from reading research from the 20th century still under **copyright**. (Copyright is covered in more detail in Part II: Copyright Essentials.) Even when copyright is not an issue, many resources are only available in print. For example, at the Peabody Institute, the Filby Rare Book Room has 2,320 rare books. Nearly all of them are in the public domain

and could be freely available online. However, to date, only 244 items in that collection have been found to be digitally available online—only 10.5% of the collection!

Indexes can help fill the gap when we want to find published research that may not be available in a database. The Répertoire International de Littérature Musicale (RILM) is an index for musicians and performing artists. It covers music research from all disciplinary perspectives from more than 2,400 scholarly journals. But even RILM can only provide full-text access to a small number of titles: 260 scholarly journals are available for full-text searching.

How did this happen? Who would digitize titles and abstracts from scholarly articles without digitizing the articles? For indexes, this is generally because they also existed in print; migrating that print index to digital was easy when research tools began to be published online. Digitizing, correcting, and hosting full-text of older scholarly articles was a time intensive and expensive venture. You can still view older print indexes of RILM online at the Internet Archive with a free account. When they were only available in print, these indexes were updated and distributed to academic libraries two to four times each year. Indexers were hired to scour scholarly journals and compile any information about any new music research to include in the index. Library users would then work with librarians to find the scholarly articles they needed or borrow them from another library.

Today, nearly all scholarly journals are published and accessed online. However, moving an entire industry online didn't happen overnight and many older publications have not been made fully available online for researchers. In the early days of online research, it was easier to move the indexes online than it was for some publications to fully publish online. Because of this limitation, indexes are still prevalent in many libraries and remain useful for finding older research that may not be online yet. It can be frustrating to find a source that looks relevant to your research, only to realize that you now have to figure out how to access the full text. Keep in mind that distributing a copyrighted work is something that only the copyright holder can do. This means that indexes can be easier to maintain and add to because it doesn't require permission from the copyright holder to list a title in index. By contrast, putting a full text online does require permission from the copyright holder.

But, don't let that discourage you! Indexes are curated by experts in specific academic disciplines who compile high-quality source lists. If you are having trouble locating a book, full-text article, or other source listed in an index, remember that librarians are always available to help you access it. They can work with you to borrow materials from other libraries or publishers to ensure you have the information needed for your research.

Unlike JSTOR and Google Scholar, these indexes rarely allow the public to search them without a subscription. However, nearly all college or university libraries in the United States welcome members of the public to use these resources when they visit the library in person. Publishers may not make subscriptions available that allow these libraries to share access remotely for researchers who are not students, faculty, or staff. In Chapter 10: Publishing and Accessing Information, we share strategies for researching that outline some of the ways you can do this work without an institutional affiliation.

4-3. Dig Deeper

Practice evaluating online indexes. Navigate to your local library website. In the research database section, check for access to Music Index or the Music Periodicals Database.

Search this index for your favorite artist.

1. What kinds of resources do you see in the search results?
2. Are you able to access the full-text of these resources?
3. How does the index compare to your Google Scholar search?

Note: Indexes are generally available by subscription access only. However, some print versions of indexes, like RILM, have been digitized for access online.

The Library Catalog

Do not to ignore the library as a search tool. Library search continues to improve and make it more seamless to search specialty resources such as research databases and discipline-specific indexes at the same time you search the library collection. But the core function of a library catalog is to provide access to the library's curated collection of resources designed to best suit the library community's needs. That means that a local municipally-funded public library holds different resources than a university such as the Johns Hopkins University.

The **library catalog** attempts to do a lot of things that Google or indexes cannot. A library catalog tries to provide the most relevant resources based on metadata available for physical and digital collections, like CDs, DVDs, books, and scholarly journals. In addition to searching metadata about all the physical items on the shelves, the library also has some full-text scholarly articles and books available electronically that it can search word for word. This distinction is important because it means you might need multiple search strategies to find all the best resources in the library catalog. If you want to find all the books about K-pop in a library, and some of them were only about BTS and did not mention K-pop in the description about the book, those books about BTS might not appear in that library catalog search about K-pop.

Physical items in the library are also coded with a specific kind of metadata called the **Library of Congress Subject Headings**, a very large but limited list of official terms that all libraries in the U.S. use to make it easier to find books on similar topics. However, because LCSH is an official list, it can be slow to change and reflect the kind of resources in library collections. There are terms for popular music, rap, and hip hop, but there is no official term for K-pop!

The library catalog strives to provide good access to many kinds of information resources—sometimes too many. Even though it includes search results from specialized indexes and research databases, you may notice that it isn't always the best place to find these resources. Research databases or indexes that only provide access to one kind of scholarly article can use specific kinds of metadata to take advantage of the resources' similarities. These search tools create powerful, specialized search terminology that doesn't have to adhere to the LCSH rules. For example, even though there isn't an LCSH term for K-pop that helps you find all the K-pop books, recordings, and scholarly articles in the library catalog, Music Index has a term for "K-pop" that easily helps you find all the articles, book reviews, and books

that it indexes on the topic. Because the Music Index terms aren't linked to LCSH in the library catalog, limiting your targeted strategic searching to the library catalog risks providing you with incomplete results. So even if your library includes everything from Music Index in the catalog search results, it might still be faster to take the time to log in directly to Music Index, identify the subjects that they use related to your research question, and then add them to your search to get to better results more quickly.

One of the most powerful library catalogs available for universal use is WorldCat. It contains information on the physical and, in some cases, digital collections of member libraries around the world. In Baltimore, you can locate resources ranging from nearby Washington, D.C., or as far away as Australia. If something is only available in Australia, your local libraries will make every effort to assist you in obtaining access to that resource, typically at no cost.

4-4. Dig Deeper

Practice evaluating different library catalogs. Remember, your local library is building a collection primarily for researchers and library users in your community. WorldCat is trying to provide a catalog that includes collections of libraries from around the world.

Search for your favorite musician in your local library and WorldCat.

1. What kinds resources do you see in your search results?
2. How do those results reflect the different catalogs?
3. What ways do these catalogs allow you to filter or sort your searches?
4. How does searching the library catalog differ from searching JSTOR or Google Scholar?

Artificial Intelligence

At the time of writing this book, **artificial intelligence (AI)** has only begun to be implemented in search. Early attempts to create good AI search have resulted in **hallucinations** with services like ChatGPT returning citations to sources that don't exist. Google has attempted to incorporate AI into its search algorithm, too. However, part of Google's algorithm relies on personalizing things for you based on previous searches or other information it may collect about you. Search engines incorporating AI that rely on personalization have been observed returning poor search results. Google has been observed providing results that list websites that provide weak evidence to answer a question or providing different evidence for different users who asked Google the same question. Always evaluate a new search tool: each of the characteristics we describe for the other search tools and the exercises presented here are designed to help you build skills to evaluate these sources, understand their benefits and limitations, and make good choices.

As AI continues to be integrated in each of these search tools, it's important to continue to evaluate a tool's benefits and limitations. You may also want to do a Google audit of your privacy settings to ensure that Google isn't over-personalizing results. Personalization of algorithms can lead to algorithms noticing and responding to your implicit and explicit biases and preferences, which can make it hard to hear a diverse set of voices in your research. This can be especially harmful when you have research questions where information only exists on the very early parts of the information life cycle, like social

media, news sources, and other primary sources. Personalization can sometimes prevent you from finding information sources from the past week, month, or year on topics where you might be trying to get outside your information bubble.

Preparing Your Search Shopping List

Now that we have explored what is behind different online search engines, you may feel overwhelmed about where to start your search. But spending a few minutes to connect your **information need** to what you know about different search tools can make your search process more efficient.

Table 4.1 Source Types with Relevant Search Tools

Type of Source	Available As	Search Tool
Primary sources	Diaries, letters, and autobiographies	Library catalog
Primary sources	News reports	Newspaper-specific database, like ProQuest Newspapers
Primary sources	Personal papers, photos, and ephemera	Archival collections
Secondary sources	Scholarly articles	Interdisciplinary databases, like Google Scholar or JSTOR, and specialized databases, like RILM or Music Index
Secondary sources	Scholarly books	Library catalog, Google Books
Tertiary sources	Subject encyclopedias	Library catalog

Use this search strategy planner to organize your search process.

One reason efficiency matters is that research is iterative. You might start your information gathering and have trouble finding appropriate resources and start again. Or you might find some really great resources that introduce you to a new idea or concept that inspires you to shift your inquiry in a different direction. You should expect this to be a part of your research process when you get started—plan accordingly!

This can happen at any time during your research process. You might start a research project about BTS and realize while you are collecting background information that New Jeans would be a more interesting K-pop group to study. Or, you may have gathered many resources about BTS and their fandom, but finding a source about how the fandom organizes philanthropic projects related to the group inspires you to narrow your search and investigate if this is true with other K-pop groups as well. Remaining open to your curiosity during this process allows you the intellectual freedom to make changes that ensure the research aspects of your research-creation work evolve in line with your **artistic mission**.

Compiling Research Ideas on Your Shopping List

Material in this section adapted from Forshee, Zane, Christina Manceor, and Robin McGinness. "Project Ideas" in *The Path to Funding: The Artist's Guide to Building Your Audience, Generating Income, and Realizing Career Sustainability*. The Peabody

Institute of The Johns Hopkins University, 2022. https://pressbooks.pub/pathtofunding/. Adapted under a CC-BY 4.0 license.

At this point in your research process, you've already done a lot of work before even doing one search for information. You now know how to map different kinds of information sources on the information life cycle; how they can be used as primary, secondary, or tertiary sources; and which search tools will be the most useful for you based on the specific kinds of evidence you need.

But you may have already run into challenges trying to share your ideas with search tools. Computers don't speak English, Spanish, Mandarin, or Korean—they store information digitally, in sequences of ones and zeros. While new technology is constantly trying to bridge this translation gap, using a **mind map** will help you translate your research questions into language that search tools understand. A **mind map** captures ideas visually, organizes them in a hierarchical manner, and discovers relationships among disparate ideas in your information needs.

Mind maps typically emerge from a single concept placed at the center of a page that is then used as a vehicle to generate material for potential solutions to a problem or a challenge.[6] In *The Path to Funding*, the authors present mind maps as tools to help you generate project ideas. But project ideas can also be thought of as the beginning of your research-creation. You can break down any part of your research-creation project to create a specific mind map to help plan your search strategy.

The following example shows how to map terminology around an area of inquiry for your creative research:

Figure 4-1. Sebastien Pesot standing in front of mind map; Exhibition "L'anatomie du Bling", Musée des beaux-arts de Sherbrooke

6. "Idea Generation - Techniques, Tools, Examples, Sources And Activities," *Alcor Fund* (blog), accessed December 5, 2023, https://alcorfund.com/insight/idea-generation-2/.

Breaking Down Your Research Topic

Hyo-Eun and Luis have inventoried their resources and know which research databases and indexes they can access in addition to Google. But because they are collecting resources about the cultural background of every member in their group, they need this process to be strategic and efficient. Hyo-Eun and Luis decide to make some mind maps to discover any shared concepts and ideas and then use the results to plan their search process.

They know they are interested in folk tales and folk songs from a number of different cultures. But Hyo-Eun and Luis also want to better understand what makes music meaningful to audiences, especially their target audience of 7- to 10-year olds. They know the mind map process will help crystalize their ideas and approaches

Why Should You Use Mind Mapping?

This process of idea generation, or ideation, allows you to rapidly develop possibilities. The more ideas that you might want to explore, the greater the chances of creating a better idea, project, or design. This is true with creative research too. Earlier in the chapter we examined how research is iterative. When mind mapping for research, you will start to map out the different questions related to your research idea. Sometimes, the first iteration of your mind map can end up looking like a connected map of different research questions. Once you have those questions, you can organize those ideas to apply in a research context.

Making a Research Mind Map

Mind mapping relies on the free association of words, allowing all possible ideas to come to the surface. As a visual and tactile process, a mind map can stimulate a wider range of connections. You can also use the process to map onto search tools and build a strategy to make your time searching as impactful and efficient as possible.

The process of mind mapping works to overcome your inner critic and ensures you capture a lot of ideas about how you view your research. Considering the terminology that appears in your initial brainstorming can also help you identify implicit biases that you hold that you can then interrogate in your research-creation project. Once you have these terms and have challenged yourself to think of different ways researchers may have articulated these same ideas, interrogate how your experiences may have shaped the default choices you made. How might someone with a different voice or set of experiences name the same ideas?

Mapping and Mining Ideas

Effective mind mapping for research-creation requires you to map your ideas and then mine them to build effective search strategies. When you start your mind map, you are just trying to see what ideas feel most relevant to your research-creation. Use software or go analog with a pen and paper to create your mind map. Butcher paper, a flattened-out paper bag, or a chalkboard are all great options. Use what's available and allows you to make the largest, wildest map of your ideas.

Follow these steps for creating a mind map.[7]

1. Choose a central research question (exploring the potential).
2. Generate possibilities (creating layers).
3. Identifying key concepts (mining the ideas).

Step 1: Choose an Idea (Exploring the Potential)

Start with a question or challenge that's related to your project and place it at the center of what will become your mind map.

Step 2: Generate Possibilities (Creating Layers)

- Draw three to five lines that extend off the central point you're interested in exploring. If you've circled your main idea at the center of your page, the image might begin to look like a drawing of the sun.
- Set a timer for 2 to 3 minutes. Giving yourself a time constraint keeps you from censoring your ideas. Go for quantity, not quality.
- Write down single words, short phrases, and ideas. They can be wild, far-fetched, or beyond what might be feasible.
- Now repeat this process by building on the first round of ideas you generated. Continue to repeat the process until you have two to three layers of word associations.

Giving yourself too much time can draw the process out, resulting in self-censoring and fussy editing. By contrast, a time constraint forces you to generate options in just a few minutes.

Step 3: Identify Key Concepts (Mining the Ideas)

This is where it gets interesting! Review your mind map for keywords, phrases, and ideas that excite you. These are going to help you create a search strategy for your research mind map that you can use with any of the search tools we've discussed.

7. Kent State Office of Online and Continuing Education, "Assignment Type: Mind Maps," September 2011, http://link.springer.com/10.1007/s10734-010-9387-6.

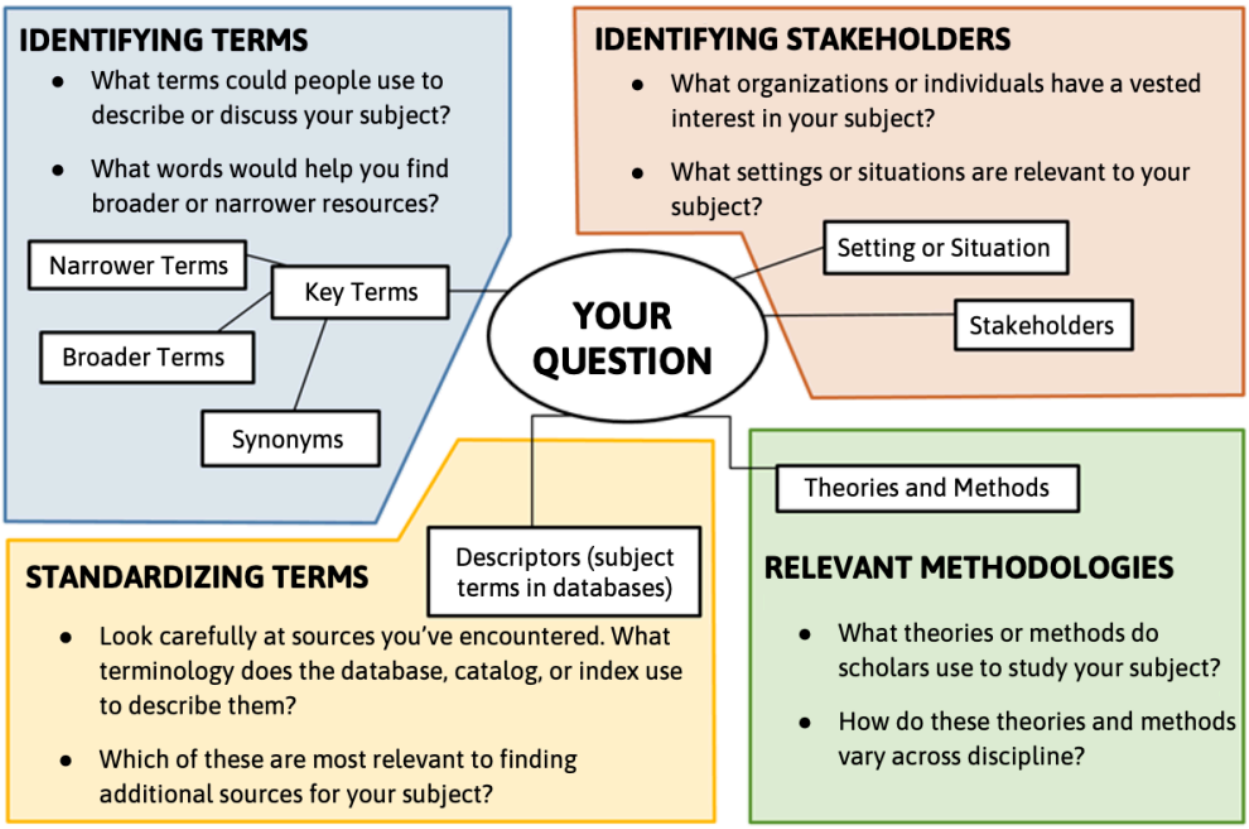

Figure 4-2. Research Mind Map

Once you've mapped your initial terms in your research mind map, it's OK to take a little more time interrogating which kinds of bias might be unintentionally appearing in your map.

- In your keywords quadrant, are your identifying terms inclusive? Do they include terms that might be used both within and outside of the communities or music that you want to know more about?
- When you look at who's represented in the Identifying Stakeholders quadrant, are there any voices missing that should be represented in your inquiries?
- Thinking back to common methodologies in music, what are the possible benefits or pitfalls of the methodologies you identified? Are there any kinds of new methodologies, like action heritage that might be missing? How might new and old methodologies work together?

You might be uncertain about database terms. Start with words or specific concepts that are familiar to you. You can collect additional terms as you search by looking at results in each search tool and identifying any subject terms, subject headings, or keywords associated with your top results. While every corner of this map can grow and change throughout your search process, the search tools terms will always be responsive to your findings.

Conclusion

Preparing for a research-creation project demands a thoughtful approach to gathering information. It begins with understanding the information life cycle and identifying the kinds of sources that will

best support your inquiry. By articulating your information needs clearly and considering the array of search tools available, you position yourself for a more effective and efficient search process. This approach not only streamlines your search but also enriches the quality of your research by encouraging you to explore diverse perspectives and methodologies.

Remember, the aim is not just to accumulate information but to engage deeply with your topic, recognizing biases, and striving for a comprehensive understanding. As you move forward, let the principles discussed guide your exploration, knowing that each step is part of a larger journey in your research-creation project. In the next chapter, we focus on how put everything together, from identifying the perfect search tool to creating dynamic search queries.

Key Takeaways

Clearly articulate your research questions and information needs before starting any search. Spending time preparing to search helps you develop strategic and efficient search processes.

Break down complex research questions into smaller, more manageable inquiries to find the most relevant sources and avoid collecting resources that aren't relevant.

Evaluate the strengths and weaknesses of different search tools, such as Google, specialized databases, and library catalogs. Assessing search tool strategically is important in developing efficient research processes.

Create mind maps to translate research-creation questions into search-friendly keywords and concepts. Mapping your ideas visually can help you see relationships between ideas and translate those ideas into language that search tools will understand.

Interrogate your research mind map for potential biases and identify places on your map where you can add inclusive terminology and methodologies to your search.

Stay informed about developments in search engines such as AI-powered search tools. Regularly evaluate AI-generated results for relevance and accuracy.

Remember that research is an iterative process. Be prepared to adjust your search strategy as you discover new insights.

Media Attributions

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5

PRACTICAL SEARCH STRATEGIES

Kathleen DeLaurenti and Andrea I. Copland

Searching

Now we're ready to search. To decide where to start, look at your research mind map and decide what kinds of sources will help answer your questions. As a reminder, these can include:

- **Primary sources**: diaries, autobiographies, archival manuscripts, news reports, social media
- **Secondary sources**: scholarly books and articles that demonstrate applications of specific

methodologies or frameworks related to your questions
- **Tertiary sources**: subject-specific encyclopedias and indexes to help you expand your background knowledge in areas related to your topic

Once you know specifically what kinds of information sources to look for, you can map them to the search tools we discussed. One way to do this is to build a search tool planner to map which search tools you want to use and how to prioritize them. An example is provided below in Table 5-1.

Table 5-1. Search Tool Planner Based on Source Type

Type of Source	Information Resources	Search Tool 1	Search Tool 2
Primary	Diaries	Local library catalog	WorldCat
	Archival manuscript	Archival collections	
	Newspaper reports	Newspaper database	Music Index
Secondary	Scholarly article or ethnographic studies	Multidisciplinary database (e.g., JSTOR)	Google Scholar
	Scholarly article or musical analyses	RILM	
Tertiary	Encyclopedia of folktales	Local library catalog	

5-1. Dig Deeper

Download this worksheet version Table 5.1: Search Tool Planner Based on Source Type and list the types of sources, kinds of resources, and search tools you can use to discover them.

Turning Mind Maps into Searches

Once you've chosen a search tool to start with, pull together your search tool planner and research **mind map** to start your search.

Here are some tips and tricks to maximize using your search terms effectively. Remember, a library catalog is not going to be good at answering your questions directly. You may need to do some translating to get effective results.

Search Operators

Table 5-2 below shares some common ways to use syntax, or grammatical operators, to make your searches more precise.

Table 5-2. Search Operators

Operator	Function	Result
AND	Used between terms, it requires the search tool to include both terms.	Narrows your search
OR	Used between terms, it requires the search tool to treat the terms as synonyms.	Expands your search
NOT	Used before a term, it excludes results that use that term. (Note: Instead of NOT, you must use a – [minus sign] in Google.)	Increases precision of your search
” “	Used to enclose a phrase, it tells the search engine to search multiple words as one word.	Narrows your search
*	Use the asterisk as a wild card.	Expands your search

Google-specific Search Operators

Table 5.3 below highlights Google-specific operators to make your searches more precise.

Table 5-3. Google-specific Search Operators

Operator	Function	Result
define:	Before a term, provides a definition with a source	Provides definitions
site:	Before a web address, returns results only from that website.	Limits what sites Google searches
filetype:	Before a filetype extension, returns only results of that filetype.	Limits the kinds of results by filetype
before:	Used with a YYYY-MM-DD format, limits results to before a specific date.	Limits results by timeframe
after:	Used with a YYYY-MM-DD format, limits results to after a specific date.	Limits results by timeframe

Formulating a Good Search

Hyo-Eun wants to test whether using search operators will help. Starting at WorldCat, she types:

> ("folk tale" OR folktale) AND korea AND music

By including both possible ways to spell folktale, she added about 100 possible results to her search. But because her search was precise, she only has 129 results to evaluate. Hyo-Eun and Luis used this approach to begin identifying sources about the Dominican, Nigerian, Portuguese, and French cultures connected to their project.

Luis was especially excited to learn that Google and other search engines can use these operators, too. Because he's especially interested in identifying where archival collections might be located, he decides to start looking for them. Luis starts with the following search:

> archive korea music site:*.edu

The asterisk in a site search tells Google to search for any website ending in .edu that might have archives about Korean music. These search operators produce a targeted Google results list with few advertisements.

These initial stages of research might seem time-consuming. As you become more proficient in specific areas of **research-creation** practices, your pre-search preparation will get faster. You'll develop your own workflow for identifying information needs, developing mind maps, and using the right search approaches in the search tools you choose. Over time, you will also become acquainted with the keywords commonly used in databases for particular ideas or concepts where you gain expertise. These terms can become foundational in your ongoing research and contribute to developing a structured and sustainable approach to your career. By deconstructing your search into methodical steps, you will also construct a sustainable research process that will become increasingly familiar as you gain experience, enabling you to work more efficiently and precisely in your efforts.

5-2. Dig Deeper

Practice using search operators and terms from your mind map.

- Formulate a search in WorldCat using search operators in Table 5-2. Search Operators. How well do the search results match the ideas in your mind map?
- Formulate a search in Google Scholar using search operators in Table 5-3. Google-specific Search Operators. How well do the search results match the ideas in your mind map?

Establishing Relevance

A challenge in modern research, given the abundance of available sources, is the tendency to stray from our planned resources, like making impromptu purchases during a trip to a large grocery store. While shopping, you might be enticed to buy items not on your list. Despite envisioning elaborate dishes to cook over the next few days, your hectic schedule leads to spoiled vegetables in the fridge.

Similarly, when confronted with numerous research results, the temptation to set aside seemingly relevant but slightly off-topic materials can be strong. It is imperative to cultivate efficient reading habits when engaging with your resources to counteract this.

When researching a scholarly journal article, expert readers almost never read an article front to back. In fact, people have written journal articles advocating for this seemingly strange practice![1] Different academic disciplines have different approaches, but the most common recommendation is to read the title, abstract, and subject terms (if available) to make your first determination of relevance. If you think you're trying to put a square scholarly source into a round peg, put it aside and move on. Your time is precious!

Next, read the introduction and conclusion. Sometimes you'll find that after reading these typically short sections, your understanding changes. You might put this resource back on the shelf and move on.

Your next areas of focus will vary based on the specific topic or academic discipline. For instance, humanities papers often lack clear methodology or results sections because these fields typically don't involve formal experiments. They generally describe a specific theoretical framework that they will use to analyze primary sources. By contrast, in the field of natural sciences, research papers usually include well-defined methodology and results sections due to the empirical nature of the discipline.

If you're exploring research in a different field, examining these aspects of a resource will enhance your comprehension of its relevance. If you are still considering a resource after reading the methodology section, it's advisable to keep this source for future reference.

Deep reading is the final step in which you comprehensively review how your findings fit together. The next section guides you on how to maximize your deep reading to synthesize the resources you gathered.

How do these strategies translate into reading a book? With books, it can be more difficult because we may have to decide to get access to a print copy of a book before we determine its relevance to our research process. Google Books can be a good support tool in this case. You might not start your search there, but you can look at a preview of a book by reviewing the table of contents or the index. Found in back of a book, book indexes are an important tool in deciding if a book is relevant to your research. If the terms you're interested are not listed in the index or seldom appear in the text, you do not need to spend more time with that book. Back on the shelf it goes!

1. V M Subramanyam, "Art of Reading a Journal Article: Methodically and Effectively," *Journal of Oral and Maxillofacial Pathology* 17, no. 1 (2013): 65–70.

Evaluating Sources

Assessing a source's relevance is just the beginning of source evaluation. To ascertain whether a source effectively supports your creative research, your next move involves analyzing it within scholarly discourse. This will help you grasp the underlying elements of the source, such as the individuals involved, the subject matter, the location, and the reasons behind a **scholarly article**, blog, sound recording, or other form of evidence.

Methods for Evaluating Sources

Librarians have been devising ways to help researchers evaluate sources since the online information boom of the early 2000s. These tools not only help you find sources that are accurate, relevant, and authoritative, but they can also help ensure that the evidence you are using provides multiple perspectives. Exploring evidence from authors who bring different experiences and expertise ensures that more inclusive practices end up in your work.

Traditional knowledge systems do more than impact the way that we organize information or how we build archival collections. These systems also impact which scholars have their voices and perspectives amplified through traditional information sources in the information life cycle. Several projects, notably Women Also Know Stuff, Cite Black Authors, and People of Color Also Know Stuff, have been established to help amplify voices of scholars who may not be as visible in your search process.

There are many acronyms to help you remember important criteria for evaluating a source. We recommend the ACT UP method devised by librarian Dawn Stahura. ACT UP not only helps researchers think about the who, when, and why of an information source, but also opens a pathway to contextualize those questions within institutional systems that can sometimes privilege certain voices or perspectives.[2]

2. Stahura, Dawn. "ACT UP for Evaluating Sources: Pushing against Privilege. Stahura College & Research Libraries News," November 8, 2018. https://doi.org/10.5860/crln.79.10.551.

Table 5-4. Evaluating Sources via the ACT UP Method

ACT UP	Description
Author	Who wrote the resource? Who are they? Background information matters.
Currency	When was this resource written? When was it published? Does this resource fit into the currency of your topic?
Truth	How accurate is this information? Can you verify any of the claims in other sources? Does it include typos and spelling mistakes?
Unbiased	Is the information presented to sway the audience to a particular point of view? Resources should be impartial unless otherwise stated.
Privilege	Check the privilege of the author(s). Are they the only folks who might write or publish on this topic? Who's missing in this conversation? Critically evaluate the subject terms associated with each resource you found. How are they described? What are the inherent biases?

A significant yet overlooked part of the ACT UP method lies in the UP. We often assume that "unbiased" means having no point of view, but research can include limitations and conclusions. Those conclusions may not always be accurate.

- Does a resource explicitly contextualize what it can and cannot achieve within the scope of the book or article?
- Does it use language that tries to convince a reader of a particular perspective?

Privilege is also something that scholars have not always considered when evaluating information sources. Understanding who an author is and what privilege they possess within the context of the source—whether it's a newspaper article or a scholarly article—can help you identify inherent or

sometimes invisible bias. Stahura hopes that by "poking holes in scholarly resources" we can "shift the research paradigm to make room for other voices"[3] in our research-creation work.

Understanding the voices represented in the evidence you use is crucial for creative researchers. If you aim to be a citizen-artist engaged with your community, it's important to create work *with* local community members, not just *for* them.

5-3. Dig Deeper

Evaluate a source for inclusion in your research-creation.

Use the **ACT UP framework worksheet** to evaluate a source that you discovered searching WorldCat or Google Scholar.

Resources as Time Machines

Google serves as a vast resource hub. It offers two notable tools for exploring research. First is Google Books, which helps you search within books and access them in your local library. Second is Google Scholar and its *Related articles* and *Cited by* tools to help you stay on topic in your research.

These two features of Google Scholar allow you collect resources on your topic with a single search. This allows you to leverage a single source to search forward and backwards in time in the scholarly record. This helps you collect additional resources that are more likely to be related to your research question without having to have the perfect search terms.

When you find a scholarly article, start by copying its citation into Google Scholar. Below your citation, you'll typically find several link options. The first essential link is the *Related articles* link. This feature displays research that Google Scholar identifies as related to your chosen article.

The second link, the *Cited by* link, offers valuable insights. It reveals the number of authors who cited the article, providing a gauge of its significance among scholars. This information can help you assess the article's impact. Additionally, clicking on *Cited by* link leads to all of the articles indexed in Google Scholar that cite your article, offering a glimpse into future scholarly discussions and applications of the research.

When you keep finding the same articles, you know that you've found the literature that established scholars include in their own work. It's good to know which resources researchers hold up as important work in an area of inquiry. However, especially in some areas of music and humanities, it is important to recognize that this practice has made some voices dominant in the scholarship. Scholars who seek other paths of inquiry may be harder to find when we have access to so much information. Just because a scholarly article is not cited many times does not mean the scholarship is not valid. A scholarly article's low citation count doesn't invalidate its scholarship. If it aligns with your research and meets evaluation criteria, include it in your work.

3. Stahura

Organizing Your Research

Once you feel confident leaving some research resources behind, your next step is to make a plan for organizing your resources so that you can access everything you need during your writing process. Earlier in this book, research was compared to grocery shopping. Organizing your research pantry is an important part of your process, but too many people leave this task for the very last step.

Research is iterative. Staying organized can make each iteration as efficient and specific as possible while keeping you focused. This is critical to helping you avoid unintentionally expanding your topic too much or collecting so many irrelevant sources that you struggle to sort through them.

Keeping Track of What You Already Have

Sometimes when you shop, you might purchase a loaf of bread, only to come home and find that you already had one in your pantry. One way to avoid repeating your research is to put everything in one place as you go. We highly recommend using a **citation manager**, such as Zotero or RefWorks, to keep everything together and make collaboration easier.

Zotero is free to use. This open source application is maintained by a nonprofit organization that creates tools to improve research for those working in the humanities. What sets Zotero apart from other tools is how it interacts with both scholarly and nonscholarly content. For nonscholarly content, such as websites or blogs, Zotero saves a copy of the website from the day you collected it. That means that any time you cite this website, you can reference exactly what was on that webpage the day you saved it (even the ads). This can be very important in a digital age where edits or corrections can happen, or websites can even disappear!

Zotero also a useful tool for saving things about you. Consider creating an "About Me" collection in a citation manager. This is a great tool for organizing press and reporting about your performing and creative research endeavors. You can save every newspaper, magazine, and online interview online exactly as it appeared on publication day. This allows you to keep track of how the world is talking about you and your work as well as saving other research for your projects.

For scholarly articles or books available in a PDF format, citation managers save both the metadata about that item and the file itself. You can then annotate that file, create tags across your research, and make notes that become fully searchable. This keeps all your work in a single place to access throughout your research process. This cross-indexing is helpful when you need to remember why a source was important when you saved it or details from your deep reading.

Lastly, many citation managers also function as a plugin that work within most word processors, including Microsoft Word and Google Docs. In addition to automatically adding citations during your initial drafts, the plugin can create a bibliography in your chosen citation style––Chicago, APA, Harvard, etc. Instead of spending time looking up where periods go or if the year should follow the author's name, the citation manager does it all and saves valuable time.

As musician-scholars transition from students to professionals, it's important to reimagine the tools you used in a classroom for your professional research-creation projects. In Chapter 1: What Is Research? you learned about the different ways research is a part of all facets of your creative process.

Citation managers can add value and efficiency to any research project you approach using any of the four research-creation modalities. Use them for grant proposals, news articles or blog posts, or even program notes. You might not make those citations available to your audience in your final format, but the work is documented if any questions arise later.

Managing your citations is also not simply for writing scholarly articles or books. It is critical to save all of the resources you used as evidence no matter what research-creation modality you were working in. We've explored the ways that you integrate research into your artistic practice, and as these practices evolve, you will collect many resources for your research-creation processes. You may compile resources to produce a performance, understand repertoire, or write a grant narrative. Creating a personal archive of your research resources helps you leverage connections across research projects in your own work.

> "When writing program notes for the Seattle Symphony, my initial drafts contain citations for every fact. Although I strip out the citations in subsequent drafts, those citations not only ensure truth and accuracy but also allow me to answer any questions that my editors might ask. I can point to measures in a score or manuscript and the composer's letters, and buttress my writing with ear-witness accounts, books, recordings, and scholarly journal articles. Synthesizing a variety of sources enables me to share interesting and unexpected connections with the general reader.
>
> "For example, in a concert featuring Shostakovich, Stravinsky, and *The Tale of Tsar Saltan Suite* by Rimsky-Korsakov, I noted that the first opera Shostakovich saw was *The Tale of Tsar Saltan*. He liked it but worried that learning music would be 'too hard to grasp.' But there is another connection. Rimsky-Korsakov gave the manuscript of the suite from *Tsar Saltan* as a graduation gift to his pupil, Igor Stravinsky." **Christopher DeLaurenti, composer and music journalist**

Additional Organizational Tools

There are other tools you might want to consider adding to your research process at this point. One downside to citation managers is that it can be difficult to have a full map of your notes and tags. While tagging and adding notes can help you summarize and organize, synthesizing your information gathering to use as evidence can be more cumbersome.

You might consider developing a tool or matrix that contains your notes and tags in one spreadsheet. This can help you find patterns and synthesize information from your compiled research resources. It's up to you how to organize your matrix, but one approach is to list all your sources by date and include the author and title in their own columns. Depending on the scope of your inquiry, you'll likely have a mix of scholarly and nonscholarly sources. Additional columns could include themes, methodologies, or important notes from results and conclusions.

If you want to use a template, consider this literature review template that lets you list, organize, and synthesize ideas from your research-creation work.

The notes you take and the initial coding in your matrix act as summaries of what you've curated. The next step is synthesizing this information, pulling together data from multiple sources to make larger

points in your work.[4] As you build your matrix and start to synthesize the information, you'll be better able to sort this information in a variety of ways and begin to identify patterns.

Building a research matrix can also help you see holes in your resource gathering. Now, after doing deep reading and organizing the resources you collected, you can be even more specific in additional searches to fill those gaps or answer those additional questions.

The research process we set up, from locating the kinds of resources you need along the information life cycle to searching with a specific search tool, may seem like a straight line. However, at any point in your research process, you may need to go back and repeat a step or even start over in a new direction. When you have an efficient, strategic process for gathering resources, these detours are not intimidating. By building a solid research process, you can focus on following your curiosity instead of worrying about deadlines.

Conclusion

The journey of research is a multifaceted process that requires meticulous planning, strategic searching, and critical evaluation. By carefully determining the types of sources you need, whether primary, secondary, or tertiary, you lay a strong foundation for effective research. Utilizing mind maps to translate your research questions into a coherent search strategy, and employing precise search operators, can significantly enhance the efficiency and relevance of your searches. It is essential to engage with sources critically, using tools like the ACT UP method to assess their reliability and relevance, ensuring a well-rounded and inclusive approach to your research. Organizing your findings with citation managers not only keeps your research process streamlined but also prepares you for effective synthesis of information. This approach allows you to identify key patterns, fill in gaps, and make connections that are essential for drawing insightful conclusions. As you navigate the complexities of research, remember that this iterative process is a journey of discovery, where flexibility and a willingness to refine your strategies can lead to profound insights and contributions to your field.

Key Takeaways

Map out which search tools (e.g., library catalogs, databases) to use for finding different types of primary, secondary, and tertiary sources. Prioritize these tools based on your research needs.

Convert your research mind map into a structured search strategy. This involves selecting search terms and deciding which search tools to start with.

Using citation managers like Zotero or RefWorks to organize your sources. Use literature review templates to track themes and ideas that emerge in your research-creation. Organizing as you go prevents duplication and keeps your research focused.

Use reading strategies and the ACT UP method (Author, Currency, Truth, Unbiased, Privilege) to assess the reliability, relevance, and bias of sources. This ensures the use of high-quality and diverse perspectives in your research.

4. "Synthesizing Sources - Purdue OWL® - Purdue University." Accessed July 6, 2023. https://owl.purdue.edu/owl/research_and_citation/conducting_research/research_overview/synthesizing_sources.html.

Be prepared to refine and repeat search strategies as new information and insights emerge. Effective research often involves revisiting and revising initial plans.

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6

RESEARCH: AN EXPERT PANEL

Kathleen DeLaurenti

Each of our expert panelists shared the way they define research with us. One thing that's consistent with musician-scholars is acknowledgment that research requires building and access to knowledge systems to understand or construct new knowledge. They also view this as a core part of their musical lives.

> "Research is a system in which to find the deepest, truest facts and information of a particular subject. It's an exploration to get to a deeper core, which of course really ties into the core of music and the value of what music is." **Jonathon Heyward**

> "Research is studying anything that's unknown to you and potentially finding something that is also unknown to others as well. You're starting with this kind of question of wanting to know about something that you don't know about. You're starting to read and listen and explore various resources about that, and continuing to read and find out all that there is to know. Perhaps then stumbling onto a gap in the kind of general knowledge base and being able to uncover new information about a particular subject." **Paula Maust**

> "The artistic research I do is diligent. It's usually systematic research and something I'm interested in, something I'm curious about. There's a lot more self-motivation involved in my artistic research as opposed to maybe research I might do for a journalistic story." **Kyoko Kitamura**

> "Research is intentional inquiry to make meaning. In the classroom, I feel like I'm doing research all the time. I'm often with students who I haven't met before, so I have to get to know them. I have to do research about them and their interests. I'm always asking questions. I'm always probing, I'm always trying to learn about them so that the experience that we're making together is relevant and interesting to them. So that's kind of a microcosm sort of research that applies to me. But also, of course, research really impacts my work in the big study kind of way—really looking at how we know it's effective in teaching, how we know it's effective in the arts in terms of impact. Research is both mini-inquiries into people in the moment but also very broad studies into the bigger picture of the work that I do." **Christina Farrell**

> "Research is a process of seeking to better understand something about the world through asking questions, gathering information, critically and examining materials and information, analyzing data, and then sharing those results and coming up with new ideas as a result of that process." **Lauron Kehrer**

Dr. Suzanne Kite acknowledges the different lenses in her definition of research and the different modes of research that exist in different cultural contexts.

> "I think I have a unique perspective on this. It's different than other kind of academic researchers. My view of research is as a toolkit of inquiry for any medium or mode of learning. To me, research is just a term in a larger toolkit of ways we make new knowledge. I think of research in my practice as specifically the creation of—I guess, the curation of all tools available to become prepared to make an artwork, to become prepared to make a statement or develop a thought out loud or into a sharing possibility. So to me, research is very flexible and can include traditional forms of research, like reading, discussing, interviewing, and extremely heavily cited works, or it can be modes of indigenous research, which are very much listening, showing up in community, co-creating. And then I also see research as even the act of making or experimenting as in artworks." **Suzanne Kite**

However, understanding how research fits into your artistic practice as a musician-scholar is something that you'll realize over time. Professional musicians, teaching artists, and musician-scholars in the academy recognize that often, novice musician-scholars often have misconceptions of what research is.

One of the biggest misconceptions they experienced was thinking that research would not grow to be a significant part of their professional work as musicians.

> "One of the biggest misconceptions is the idea that it [research] doesn't relate to what we do on a daily basis. Research really is embedded into the way that you perform, why you perform, where you perform, what you perform. It answers a lot of bigger questions. It's one of the things that I sort of wish someone would've nudged me about—the deeper meaning of what you're trying to achieve as a musician." **Jonathon Heyward**

> "A misconception that I had for an unfortunately long time was that research and academic work was something that you did as one separate thing. And practicing and studying your repertoire and playing recitals and concerts were things that you did separate from that, and they weren't this merged concept. I believed that for quite some time. When I had this epiphany moment that I couldn't do one well without the other, it completely changed the entire trajectory of how I structured all my academic and creative practice and work." **Paula Maust**

> "Students ask why it matters to study this, and other people are studying that. I just want to play really well. We should all want to play well, but playing well can be significantly amplified by also doing research, and you can have this balance of both, and they both inform the other." **Paula Maust**

> "I think probably the biggest misconception is that it's not necessary. I think the other misconception is that it's not political and not absolutely necessary for contextualizing what we do. I also think another misconception is that it is only in reading. And I think that leads to a lack of citational politics in artists when, even as a classical musician, as a classical violinist, by learning from one person, I'm citing everybody who taught them. So yeah, I think those are misconceptions. But I also think that people think they're not doing research when they are—they're already doing it." **Suzanne Kite**

It can take time to identify what research might emerge as being central to your practice. Different lenses and methodologies to approaching **research-creation** projects can be important in different parts of your career. You might find research opportunities in unexpected places. Sometimes research questions emerge from defining your mission as a musician or realizing that it's the missing piece in advancing your practice.

> "I had a huge misunderstanding about what music was. I never asked why music exists. Practice time took a lot, and I didn't really question why I was doing it. I also didn't question why I was playing European music when I'm obviously not European, right? Once I started asking those questions, I realized that I could approach music in a more holistic way. That it's not about producing, it's not about composing—it's about communicating. Communicating through music, communicating with music, communicating with your peers, and making your ensemble members sound great, right? Because if we all sound great, and if we're all working to make the other person sound great, we'll all be great. So that's an interesting parallel to society. But the

main thing was that I did not understand the holistic nature of what music was, which today also encompasses the marketing and the commercialization of music." **Kyoko Kitamura**

"When I think of my early career, I probably didn't think about research much, honestly. I think research really impacted me as a musician, just in terms of my artistry—researching a role that I was going to perform or researching the history of the music, right? As a performer, research started to come in the form of data collection in terms of audiences—how do we sell tickets, who's coming to the show—and doing research into demographics. But there's a much broader world. The misconception might be that research is limited to some of these obvious things, but as I've gotten older and sort of expanded the scope of the work that I do within the arts, research appears everywhere. The misconception is that it's only for certain people who are interested in that. But research really makes an appearance in all aspects of the work we do, as artists and when trying to promote our work and have others support our work. It's everywhere." **Christina Farrell**

Identifying the ways you'll integrate research regularly into your practice can take time. Eventually, it may become a fully realized aspect of each performance you create. It also helps you understand when your research is a creative practice, when it informs a creative practice, and when you choose to make creative decisions that might go against research. Once you understand that research is integral, you can build and refine approaches that align with your practice and artistic mission.

"I have created a space in my artistic practice for it to be crossing over a flow between both, where I make sure I carve out time to do research in a lot of my projects. I also make sure that there are parts of my performance, art practice, or music-making practice that don't, where I can just let the knowledge kind of flow through me, where I can just perform or improvise. I keep a special place in performance for that. But I do know that I have the option to seek out long-term projects where I can say, well, there's going to be a research phase. This project's going to take me 10 years, and there's going to be a two-year research phase, or this project is this composition, and this commission is at a site-specific area. I'm going to make sure that I collaborate with people to find out as much as I can about the context and history before I show up and do something. In that way, I can either build in those methodologies to the very real art-making practice or I can allow research and reading and discussion to be part of the entire process. I have a special interest in doing that sort of thing. Not everybody's very interested in including a lot of research methodologies, but I see how they are the core part of what makes new knowledge. If I'm not very carefully and thoughtfully situated, I can't come out with a piece that I can stand behind in the long run. I don't want to make shallow work." **Suzanne Kite**

"In my artistic practice, [research] forms a basis for the way I perform pieces and the aesthetics that I aim for. But at the same time, I have to balance these formed opinions I have with the things that I enjoy. As a performer, that's something that we should always keep in balance, remembering there can be an informed way that this is supposed to happen. That does not invalidate your opinion about how you want to perform the piece.

"This is particularly prevalent in Western classical music, where everything is supposed to be written down and given to us from the creative part of the process. Be okay with saying, 'Oh, well,

all this research says to do it this way, but I like doing it this [other], way and I'm going to do it because I think it sounds better.'" **Robin McGinness**

This doesn't mean that professional musician-scholars don't have common, ongoing challenges in their research-creation process. Just like habits in our playing or performance that we want to be aware of, it's important to think about our own biggest challenges with research as you develop your research-creation practices.

"There's either too little or too much information about a given topic. I see this a lot with my students and with researchers who are just starting out, who are kind of afraid. Either something they're really interested in has already been talked about to death and there's nothing new to say about it—and that's almost never true—or they swing in the opposite direction, and they think that there's just not enough information out there. There's not enough that's already been said. Neither of these things are true. When that comes up for people, it just means that people are thinking about research in a pretty narrow way and not thinking about the bigger connections between their questions and what interests them and what does already exist out there." **Lauron Kehrer**

"That it has to happen in a book or on the internet—obviously in the modern age—but in some sort of print medium. A more traditional researcher within the area of performance practice is Will Crutchfield. Crutchfield, known as a conductor and a music writer, has done a lot of research about the bel canto style of singing and how it applies to performance practice, both in terms of technique and style. He's done a lot of original source material research with recordings and original treatises. That's very specific—we're going to the books; we're going to the original sources. But at the same time, he has spent a lot of time working with singers, working with people in this context that's not just reading books. It's interactions, it's listening, observing, doing all these other things that don't involve sitting down and reading something that informs that opinion. To me, that makes his discussion much more interesting. That is also an important thing to keep in context when you're trying to form an informed opinion." **Robin McGinness**

Sometimes, as Christina Farrell notes, those challenges can happen when you're trying to communicate value to policymakers, funders, and government agencies. Knowing how to access information in ways that your audience is willing to engage with can be another challenging part of the process.

"In trying to advocate for teaching artistry and arts integration, I really do want to provide academic research. But I have definitely hit that barrier of just wanting to pull a quote and refer someone to that paper, and I can only get the excerpt or the highlight. Another barrier to dissemination is who are the people reading white papers? It's really only academics. The people who I need to be reading those white papers are legislators, arts administrators, and school board members, right? They're not going to go pull out these papers. How do we get some of this valuable information that's happening with researchers in the fields of arts integration and get it in an accessible, easy-to-handle, easy-to-read way to people who actually could make an impact by knowing that information? So that seems to be a disconnect. Even with the papers that I've

been a part of, I end up simplifying and translating in a way that makes it more palatable for audiences that are not going to sit and read a research paper." **Christina Farrell**

When you're first getting started, it can feel overwhelming to try to address these challenges in your research-creation practice. We asked our expert panel what their turning point was in integrating research into their practice. They shared key moments in their professional lives when the research in their research-creation process started to make sense for them.

"I was studying conducting on the research side of things and how that [process] embedded in my ideas on how to interpret and what to interpret and how to bring certain things out. To me, that was a turning point as a conductor to become an artist, a real thinker of what and why I needed to analyze or why I needed to research—it was to get to the deeper meaning of an interpretation." **Jonathon Heyward**

"When I first started teaching music theory, I was teaching the core theory classes and had to choose a textbook. None of the books had any significant examples of music by historical women and or people of color. That was a moment where I wanted to use research to change the way that I was teaching my classes. In 2015, when I started collecting those examples and talking about this problem, no one really listened or cared. Several people told me it wasn't possible to devise a set of musical examples that were good for teaching because women weren't writing music before the 20th century. That was the important moment of realizing that I could use research for a significant social impact as well as an impact on my performing career. Ultimately, that work led to a very messy spreadsheet of a collection of examples by women and/or people of color active before the 20th century that I was using to teach. When COVID canceled a year of concerts, I took those examples and found a lot more and developed them into Expanding the Music Theory Canon. Then, due to the growing awareness of disparities in music theory education, it went viral and was suddenly being used in 61 countries in 24 hours. The moment was realizing where the significant gap was in the literature, a literal gap in literal literature, and knowing that it was something that I had the pedagogical expertise and desire to fill." **Paula Maust**

"Research as a journalist often was job dependent. [I realized] artistic research feels more about me. Although it is also job dependent, it depends on what the vision of whoever I'm working for is, and I will have to research that vision. So that's something that's very common that runs through both my professional fields. In both journalism and music research, I must be very diligent and stay on target. It's systematic. There are no shortcuts." **Kyoko Kitamura**

"I had to learn different methodologies for keeping at the core—the artistry, the fun, the personal connection, and the meaning making—while still providing a tangible source of evidence that it's impactful, that connects to learning, that's going to be sustainable over a long period of time. Without that kind of research on the impact of my work, I wouldn't get funded. It just comes down to the basic fact of needing to get paid for the work. To a grant organization, you really do have to provide evidence for how impactful it is." **Christina Farrell**

"I am a classically trained flutist, so I went to college thinking I wanted to be an orchestral musician. I was also very interested in women's studies. What ultimately drew me to start to do research was as a performer taking the required music history courses. But looking at primary sources and looking at the historical and social context in which the music I performed was written and originally performed helped give me a better understanding of how to interpret it. That's true for a lot of classically trained musicians, and that's something that music research can be helpful with.

"Because of my training, I felt more closely connected to more historical musicology. Popular music was not really integrated into musicological study. It was still very much the outskirts and not fully incorporated. I didn't have any coursework related to popular music study. But in terms of being a popular music scholar, it was important to me that I engage in other disciplines, like women and gender studies, but also Black studies, also American studies, sometimes with people working in English and other departments. Pop music studies and hip-hop studies are by their nature interdisciplinary. It was important that I be part of those conversations and know what other people are doing in other fields. I could then take it back to the fields I was trained in and look at these questions. This way, we can still focus on music, which is what sets ethnomusicology and musicology apart. But we could be asking some different questions, and we could be framing our work in ways that are more attentive to the communities that are making this music." **Lauron Kehrer**

"[Research] has influenced my art. If we're thinking about performing artistic perspectives, this experience has influenced it a little bit, but it has influenced the way I work much more broadly than just in terms of performance. In terms of how I teach, how I engage with people, generally how I go through my life is kind of an understanding that we are very predisposed to getting stuck on early ideas, getting stuck on the first solution that comes to us. It's not something that is a reasoned decision, so figuring out methods for moving past that or through that. Artistically, this applies to figuring it out and not getting stuck on the first interpretation of a piece.

I've always been interested in having informed opinions about how our minds work, how creativity works. This was something that came up through—I wouldn't say dedicated research, although there has been dedicated research that I've done on the subject—decision-making and how we are creative, which basically became part of my method of living life. If you are listening to a podcast that you find interesting or effective and you can incorporate it into your art or incorporate it into your life, why don't we think about that as research? The catalyst point [for research] can be anywhere." **Robin McGinness**

Many of the experts we spoke with are also interested in understanding whose voices, ideas, and perspectives have been privileged by traditional archival, publishing, and research practices. They use their expertise in traditional Western research skills to identify opportunities to elevate new voices and perspectives in their research-creation practices.

"I think that there's a lot of important reconfiguring of the term 'research' that's been done, especially by Linda Tuhiwai Smith, who's a Maori researcher. There's been a lot of effort in the past 20 to 30 years to try to create space for other forms of knowledge making outside of science

and the modes of knowledge making that science does. We know that that is not the only form of knowledge creation in the world. There's a difference in indigenous communities between truth and community truth, and then a scientific truth. Just because science can't deal with a certain topic like spirituality or the question in my research of 'Where do songs come from?' Just because it's not the right tool for that doesn't mean it's not the right tool for other modes of knowledge making. And both can be helpful.

"I think the point I'm making about community truth—my favorite paper [about this is] called 'Truth in Native American Epistemology' by Jim Cheney. When we deal with community truth, that means that it's good and true and healthy for the community. So those things apply very much to art making, where we're making art and ideas about storytelling and myth and nonhuman beings speaking. This is very important to communities and keeps our communities healthy spiritually as well as physically. We talk about storytelling and art making—those things tie in and have important crossovers into science and technology. They do get complicated, but that doesn't mean we have to throw them out altogether." **Suzanne Kite**

"I think about which communities and music practices are being taken seriously and what it looks like to take them seriously. In my most recent work, I've privileged the work of black, queer, and trans artists. These are communities that have been marginalized as subjects in ethnomusicology and musicology in terms of projects and people's focus on them.

"One of the things I try to challenge myself with my research is not only say, hey, look, here is some stuff that is happening, but also talk about why it's relevant, beyond just those communities. It was important to me to convey, especially in the last book project, breaking down this misconception that these queer artists who we see now in the mainstream, who we hear on the radio, that this is an entirely new phenomenon that's never happened before. Instead, put them in a larger conversation with a sort of historical lineage of other black queer artists historically and consider how these things are tied together. I want to show that these communities with rich histories have been intertwined with popular music for a very long time and call attention to those histories that have been very much marginalized in our conversations about popular music.

"In that way, my research and the research conversations that I engage in are about calling attention to music practices that have otherwise been marginalized and that can, beyond our research, hopefully also give some credit to artists who may not have received that historically." **Lauron Kehrer**

The experts we spoke with also talked about some of the details in their research-creation process. They think about accessing, organizing, and evaluating the sources they use in many of the ways we explored in this book.

"I often ask my students to consider if the source is right. By source, I don't necessarily mean the journal or the publication, but the folks involved in presenting research. What are the stakes? Who are the stakeholders in terms of information being presented and can you ascertain what their level of involvement is with those stakeholders? I'm speaking largely here from the humanities perspective, which is different than public health or STEM-related fields. Being a white scholar who works predominantly on black music, what are my citation practices? Who am

I engaged with? What is my track record in terms of who I collaborate with? This is something I look for from other scholars, right? If someone publishes an article on Beyoncé, does this person have a history of working on this topic? Related topics? Or is this someone who went to a Beyoncé show and really loved it and published something rather uncritical of the artist?

"What are people saying about a thing from this perspective versus what gets published about a thing from another perspective? It gets increasingly challenging as everything moves online. It can be hard to determine the type of source when everything has similar URLs. This is why spending some time on a topic and getting to know what the bigger conversation can help build up that literacy. So, when you encounter a new piece of writing or new literature, having the background knowledge to evaluate where it fits in to what I have already encountered and what is the purpose of this piece? Is it supposed to be persuasive? Is it supposed to just add information? Is it reporting? Is it analyzing from a particular framework? Those are kinds of questions that I want folks to consider when they're encountering a new piece of information." **Lauron Kehrer**

For many novice musician-scholars, archival research often seems like something you only do when you're studying at a university. However, our experts talked extensively about the ways that archival research continues to be critical in their work. From comparing original manuscripts to published editions of music to identifying how different cultures voices are accessible to researchers, they provide invaluable insights into music traditions.

"Whenever I can, I try to go to these mega archives where you can see the real manuscripts, you can really understand the letters, you can understand what's going on, because that gets to a truer interpretation of what the composer is trying to say. That's what we are as artists, as conductors, as musicians—what is our responsibility. We have to get closer to the utmost true meaning of what the intention of the music is about.

"Just understanding and researching moments like this getting the truer deeper meaning of what [Schumann] was going through, where he was, informs almost everything that I do on the podium, from the tempo, from the architecture, from what I program even around the symphonies. Archival research for me has always been a deep interest because it makes me feel that I can get to a deeper meaning of the music, which I think is core and pertinent to being able to interpret the music." **Jonathon Heyward**

"If we take 'archive' to mean a few different things in traditional arts, I'd say my engagement with Lakota archives is very dependent on institutions that have collections of Lakota artifacts, both collected in good ways and collected in bad ways. Putting them online and having them be accessible is critical because otherwise we don't have access to them. I have felt the pressure of knowing I could not physically access an archive unless I went through some really extreme process—I'd have to get a residency with the Smithsonian, go through their whole process in order to even just see some of these very private objects. So having them be accessible online is critical. In terms of song archives, that is not very accessible. I'd have to go all the way from wherever I live to the tribal colleges in South Dakota to listen to songs. They're not online. And in terms of artificial intelligence research, that is the form of archive that is so big as to be difficult to even deal with. I'm talking about data sets. So large data sets: We've gone from using small data

sets to exponentially large ones, and the ability to traverse them is nearly impossible. It's a black box of data, and it's really up to data scientists and people who do knowledge translation to make those easier for us to navigate. I rely on people's papers who deal with those." **Suzanne Kite**

"I'm always trying to have a variety of different venues or avenues or means of distributing my work. The book is a published physical copy. The website is an open education resource that is freely available. Concerts are either recorded and then available later for people depending on what I decide to put online or they're a one-time experience for an audience. I'm always trying to have a mix of things that have a very niche or specific audience and things that could be much more broadly or globally distributed. My goal is always to have kind of a mixed portfolio of what it is that I'm producing and how it's being disseminated." **Paula Maust**

"In 3D, you can walk around a performer: Look at his hands, look at the way he's engaging with the instrument. For me, the immediate shock was the amount of information we could gain from that as compared to something that we might read or something that might be 2D video. It was incomparable. Archive relates very heavily on the model of technology that's existing. Archive is fluid." **Kyoko Kitamura**

"One of the methodologies of arts integration is using a work of art as a lens for learning. If we're looking at a historical period, for instance, I try to find archival photos or original documents to enhance some of the curricular pieces that students might have in the classroom. Admittedly, it's a little bit of a wild goose chase sometimes. I just Google, Google, Google until I find things. Because I'm working in the classroom, I do sometimes have questions about the permissions I have to use it. If I'm just using it in the classroom, is it OK? If it moves out of the classroom and maybe into a community presentation, then is it OK to use somebody else's image or historical document?" **Christina Farrell**

"The folks who are invested in preserving the legacies of historical figures are sometimes reticent to really embrace queer figures or queer identity. There's often a downplaying or a cautious approach to what materials might be made available to researchers that could shift the discourse to being, yes, this is a queer person, right? What I really learned from a lot of my archival work is to listen for the absences of voices that are not being adequately represented or are harder to trace, harder to document. I learned more from that than what I actually found in terms of more recent queer literature and magazines.

"One thing that I have used in my work a lot is oral histories. This is another example of something that could be archived. I'm thinking specifically of the hip hop archive available online through Tulane, which also houses the Homicide Research Center. It includes interviews with local artists, again available online. You don't have to be there, which is wonderful if you don't have funding to take a trip. But it takes a lot of foresight to document these histories while artists are still alive and active, and memories are fresh. I have seen more of this interest in documenting these oral histories to archive historical information. We're coming up on the 50th anniversary of hip hop. This is an important moment to start thinking about what hip hop archives might look

like in terms of how oral histories could be part of how we maintain and document a lot of this history." **Lauron Kehrer**

"I'm going to go back to my interactions with Crutchfield and my experience of that research around early opera recordings and bel canto style. Interacting with archive material often feels a little difficult and daunting. There're often problems of access. Our library tries to make that as easy as possible. But there are also problems of translation because there may be norms that we're used to. For example, the recording technology is so different that, for me, being someone who's only a couple decades old, I have no experience of thinking about what recordings that were made on nondigital technology sound like with nondigital microphones. That's just not something that was part of my audio space as a human. There's a whole translation that you have to go through. You can be taught how to listen as the technology changes and, of course, listening to recordings of similar singers at different points can help you go through that." **Robin McGinness**

Our experts have advice for novice musician-scholars. Their perspectives as performers, teaching artists, academic scholars, and professors can help you see the different pathways to research you might engage with as your career takes shape. Their varied experiences can help you as a musician-scholar reflect on how research will be critical to your professional practice, no matter what kind of musical profession you decide to pursue.

"Being able to see research as a catalyst to performance practice is essential. They aren't two different things, you know? You don't suddenly turn on a research brain and then turn on a performance brain. There's so much beauty, interplay, and parallel to how we research something and then put it into our interpretations on the ways that we perform, the ways that we program. It really dictates everything for me—tempo, architecture, the development, and the pacing. That really creates the whole evening and the whole experience for an audience. To be able to infuse this concept and idea that research is really the catalyst, and the beginning of all great musical interpretation is really important to understand." **Jonathon Heyward**

"Ten years ago, if you had told me that I would be a music theory professor at Peabody, a book would be coming out, and that I'd be recording CDs and designing concerts of music about early modern women that are being picked up by major early music festivals across America, I would've laughed at you. Be open to whatever might come and find what it is that interests you the most. Find a way to use all the different aspects of your musical and intellectual personalities and to create a package of who you are as a musician and a researcher and as a professional." **Paula Maust**

"As a young musician, you're interested in developing a performance program or working in a community or a school setting. You want to do interactive work. One of the things I say in my consulting work is to build in a reflection tool, build in an assessment question—just build in something in which you're getting feedback from people. It's easy when you're first starting out to forget to collect that information. Over the years, I've gotten more and more creative. I've sort of approached that assessment as an art form in and of itself. Don't feel overwhelmed. You don't

have to do a giant research study around every program you do, but make sure you build in one good, juicy question you want to know the answer to in terms of your impact. Just start there, and your skills with doing research about the impact of your work will grow over time." **Christina Farrell**

"Take classes outside of music. This is hard as a music major. But any time you have elective space, think about taking some of those outside of music. Read widely. Pick up books that sound interesting that maybe you wouldn't have thought were connected. Because you never know—they could be very much related. If you're at a world-class institution with a lot of resources and invited speakers, go to public talks and see what the conversations are. What are people working on? People are invited to give talks on the cutting edge of research in their disciplines, and that's a really cool way to see what people are working on and how they're framing research questions, but also the results of their work. Explore. Stay curious and be open-minded about other interests that might come up for you as you're as you're working on your education." **Lauron Kehrer**

"I think that indigenous methodologies as a broad field in itself—and methodologies in general—are really important for not just indigenous researchers and artists. I think that they point to finding new ways to make knowledge. So I personally think that all human beings have this amazing ability to create new things. And when we want to create new things, if we do them the same way they've always been created, we're really going to end up with the same outcomes.

"But we have the opportunity in our fields to include ways of making and ways of learning from the communities we come from. It doesn't matter what community you come from—there's probably something that your cousin does, your aunt said, that would unlock an amazing potential for a new way to make something. It's the way my aunts sit down at the table and discuss something. It's the way they passingly tell me about a ghost story. It speaks to the deep depths of possibilities of cultural knowledge.

"This is not a call to make identity-based work. It's a call to know that there are other forms of research that aren't just in books. But I will say that books are important too. Just like in *The Interview with an Ant* , each book contains so much research by that person. It's a total cheat code to getting very deep into something just by opening up or listening to a book. I would encourage musicians and artists, when they're starting their careers, to value ways of making knowledge that aren't or don't feel valued in your community, like what your aunts and cousins and grandparents know and how—not what they know, but how they know what they know or how they go about learning what they learn.

"It's also making time for deep engagement and contextualization in practice. At the start of your career, you have so much more time than you will ever have ever again your entire life. And I am very grateful for those say three or four years I had, where I had nothing to do but make one piece a year because I had no audience, no one gave a crap about me or what I did. And so I was able to commit a year's worth of research to one 20, 30 minute-thing. And I really encourage people to embrace the time of their lives where no one cares because they will care later and you will care later. " **Suzanne Kite**

> "It feels almost too trite to say, 'Be curious,' but be curious. Allow yourself to say, 'Oh, why is this like this?' Then go down a little bit of a rabbit hole. We have this idea of the YouTube rabbit hole as being slothful, that we do it when we're being lazy. But indulge the YouTube rabbit hole sometimes if it leads you to learning something about a particular artist or style of music or historical period. That really getting lost in those little bits of curiosity is where we find information and make connections that are going to inspire others and give us things to be giddy and excited to talk about." **Robin McGinness**

As we wrap up our discussion on research practices, our panelists have shared their diverse experiences engaging with research in different research-creation modalities. Each panelist has underscored the critical role of research as a foundational element in their work, whether it involves understanding the intricacies of musical composition, engaging with audiences, or contributing their knowledge to the scholarly record. They have collectively highlighted the importance of curiosity, diligence, and a willingness to explore the unknown as key drivers of innovative research.

Research is not a one-dimensional activity confined to academic settings; it is a dynamic process that permeates every aspect of a musician-scholar's practice. It informs interpretations, fuels creativity, and fosters a deeper connection with the material and the audience.

Our experts have also addressed common misconceptions about research, helping us shift our perspective from one of music making to one of research-creation. From debunking the myth that research is separate from artistic practice to highlighting the ways in which research enriches performance, they have offered valuable insights for both novice and seasoned musician-scholars.

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PART II

COPYRIGHT ESSENTIALS

7

COPYRIGHT BASICS

Kathleen DeLaurenti

Why Understanding Copyright Matters

Understanding copyright enhances your ability as a **musician-scholar** to ethically and legally use copyrighted material in your creative research. It may surprise you, however, to learn that basic copyright knowledge will also help you strategically plan your search process. Knowing when something was published and if it is copyrighted can help you choose a search tool and quickly find the **resources** you need. Understanding copyright also positions you to advocate for policy and changes in the law that establish a copyright system that is balanced for creators and users of copyrights.

Staying informed about changes proposed to copyright law, policies implemented on **platforms**, and legal challenges to libraries and **memory institutions** will empower you to participate in the development of our copyright system. As a musician-scholar, you have a unique perspective on the importance of a balanced copyright system. As a copyright holder, you want reasonable ways to control your work. As an audience member and researcher, you also want reasonable access to the copyrighted works of others. You understand that we need a system that supports the rights of creators to benefit from their copyrighted works while allowing creators to share that work with their audiences and fulfill their **artistic mission**.

The Broader Research Landscape

The first part of this book introduces you to practices that show you how to effectively navigate the research landscape while helping you use the works of other creators in your **research-creation** projects. These practices will help you find, evaluate, organize, and synthesize existing scholarship. You probably recognize that much of this information may be protected by copyright. You may also have concerns about how to access or use copyrighted works legally and ethically in your research-creation projects. However, using copyrighted works as evidence in your research-creation process aligns with the ultimate goal of copyright in the United States: to build on existing knowledge as we create and distribute new knowledge. The research process makes using the works of others necessary and inevitable. At the same time, copyright can sometimes make access and use of copyrighted works difficult or expensive.

In this chapter, we consider the next step in your research journey: your creative process. This includes the generative work of writing a paper or giving a performance. Research-creation also includes the planning and decisions you make about genre, media, distribution, and access to your work. As the copyright holder of your new creation, you are empowered to make decisions regarding distribution and access. You will also be challenged to determine how to balance exercising your exclusive rights under copyright while making distribution choices that align with your **artistic mission**.

In academia, the traditional paths for sharing scholarly work have been straightforward. Research faculty predominately share their research in established, **peer-reviewed scholarly journals**, ensuring a rigorous evaluation by fellow experts in their field. Generally, most scholars view their peers as the primary audience for their published scholarship.

Musician-scholars engage with copyright along the spectrum of research activities in ways that differ dramatically from researchers that do lab-based work. As musicians-scholars, you can express and share research through diverse mediums that include written works, exhibitions, performances, installations, or recordings. This range of expression is exciting and invites you to view your research as a vibrant extension of your **artistic mission**. These possibilities should also inspire careful consideration of how you integrate research into your artistic work to communicate your knowledge and artistic vision to your audience.[1]

Because musician-scholars do so much of their work for a broader audience beyond their circle of

1. Zane Forshee, Christina Manceor, and Robin McGinness, *The Path to Funding: The Artist's Guide to Building Your Audience, Generating Income, and Realizing Career Sustainability* (The Peabody Institute of The Johns Hopkins University, 2022), https://pressbooks.pub/pathtofunding/.

peers, they are often the first community to grapple with unique copyright challenges that accompany new technologies. In the 1990s, internet radio and streaming platforms created exciting new opportunities for musicians. However, these new technologies also disrupted business models for record labels and music publishers in ways that directly impacted changes to copyright law. A critical understanding of how copyright facilitates—and sometimes hinders—these opportunities is essential.

Before we dive into technicalities of copyright, it can be helpful to know how copyright knowledge can help you with basic research tasks. As we noted, knowing if a work is covered by copyright will help you strategize your search for that work and helps you understand how you can use it in your research-creation projects.

Let's consider the case of George Gershwin's *Rhapsody in Blue*. Since its copyright expired in 2020, a research project based on *Rhapsody in Blue*, the musical work, has no copyright constraints. Whether you wish to adapt the music into children's songs as a teaching artist, **interpolate** the theme in a new musical work, or simply include part of the manuscript as a visual element in a concert program, you can proceed without needing to secure copyright permissions.

However, most major recordings of the work and published scholarship about Gershwin's compositions remain under copyright. You may need to turn to libraries that provide access to collections of scholarly articles and books to find those resources. Recognizing these basic patterns will help you navigate complex information systems that organize copyrighted scholarship and make you a more efficient researcher. Differentiating between materials widely available online in the public domain and those requiring access to specialized library collections is an important step in conducting successful research.

Copyright can be a complex maze for many musicians and performing artists, who naturally want to prioritize their creative work over legal details. Not everyone wants to be a legal expert. However, a basic understanding of copyright will empower you to maximize artistic opportunities and, importantly, know when to consult a legal professional.

Copyright Basics

Now we aim to unravel the complexities of copyright law, with a focus on the unique challenges musician-scholars face. You want to make good choices about legal, ethical ways to engage with copyrighted works, but your experiences with online platforms may seem to contradict your knowledge about copyright law.

It can be confusing when a video you posted on YouTube receives a copyright strike when it seems like creators sharing similar content do not. This perception of inconsistency leads to uncertainty about what is permissible and discourages creators from sharing their work, especially when it involves copyrighted material. From a copyright perspective, the platforms musician-scholars often use for disseminating research-creation projects, such as social media and streaming services, also operate differently than scholarly journals. Platforms are dependent on private license agreements with many organizations that represent copyright holders to permit the distribution, use, and performance of copyrighted works online. This licensing differs from the way scholarly publishers secure rights individually with authors to sell or freely share their published scholarship. Recognizing these distinctions is key to using and sharing copyrighted works confidently and responsibly.

What Is the Purpose of Copyright?

Sometimes copyright seems like a barrier to sharing creative work. But in the United States, the law is designed to foster sharing and innovation, ensuring a balanced system that benefits both creators and users of copyrighted material. The U.S. Constitution grants Congress this power:

> To promote the Progress of Science and useful Arts, by securing for limited Times to Authors and Inventors the exclusive Right to their respective Writings and Discoveries.[2]

According to copyright expert **Catherine Zaller Rowland**, this means that "copyright's ultimate role is to encourage creativity and our flourishing national culture…[It] accomplishes this by providing a balanced system that includes both exclusive rights and exceptions and limitations." In other words, copyright law aims to create balance that benefits users of copyrighted material ***and*** creators of new works for the public good.[3]

Basics of U.S. Copyright

By learning some copyright basics, you will gain confidence about several key concerns of musician-scholars and performing artists: how the copyright system works; how you can manage your copyrighted works; how to avoid **takedowns** of your performances online; and even how to ensure other creators are acknowledged and compensated when appropriate. You can also determine applicable copyright exceptions in education, analytical, and research settings.

To start, copyright laws differ from country to country. This book focuses on U.S. copyright law. While it might seem confusing to deal with copyright laws in different countries, especially when the internet seems border-less, it is crucial to follow the copyright law where you are working. Compliance with the laws of the country where you are conducting your work is essential, regardless of your home country's laws. For example, an American citizen who resides in the United States is planning a grant-funded project for a performance in Germany. Despite American citizenship, this creator must follow German copyright laws and regulations for performances in that country.

While the copyright system is complicated, securing your copyright is not. To be copyrighted in the U.S., a work must satisfy three criteria:

- It must be an original work or creation.
- It must be the work of a human author.*
- It must be fixed in a tangible format.

Currently, works created by **large learning models (LLMs) like ChatGPT, Denali, and others are also not protected by copyright.*

The requirement for a tangible format does not restrict the work to a notated print format. Dance and improvised music are often not traditionally notated; tangible, fixed formats can include video

2. Legal Information Institute, "U.S. Constitution Annotated," LII / Legal Information Institute, accessed August 15, 2023, https://www.law.cornell.edu/constitution-conan/article-1/section-8/clause-8.
3. Catherine Zaller Rowland, "Promoting Progress: Celebrating the Constitution's Intellectual Property Clause | Copyright," Copyright: Creativity at Work, The Library of Congress, September 17, 2020, https://blogs.loc.gov/copyright/2020/09/promoting-progress-celebrating-the-constitutions-intellectual-property-clause.

or audio documentation as well. Using your phone to record your new composition while sitting in a park or taking a video of your dance choreography at a bus stop establishes a copyright for those works. This flexible definition of "tangible format" also allows creators to use software or electronic instruments in creating musical compositions, which are difficult to represent with traditional Western music notation.

Once you create a work and fix it in a tangible format, it automatically becomes copyrighted. As **Brandon Butler**, the director of information policy at the University of Virginia often says, copyright is "automagical." Nonetheless, there are significant advantages to registering your work with the U.S. Copyright Office. Formal registration serves as proof of your ownership of your copyrighted works. In cases of **copyright infringement**, where someone misuses your copyright, registration provides undeniable proof of your sole ownership. Registering before a copyright is infringed or within three months of publication also allows you to ask the court to award certain kinds of damages that only apply if your work is registered for copyright.[4]

However, not everything that meets the three criteria to be copyrighted qualifies for copyright protection. Copyright law does not protect titles and short phrases, ideas, facts, and works created by the United States government. Many musician-scholars find it surprising that ideas are not copyrightable. While ideas are central to our work and creative research, the law requires a work to be fixed in a specific expression, or version, to be copyrighted.

For example, we can consider the plot of a story where a young man discovers that his uncle murdered his father and seeks revenge. One of the most famous expressions of this tale is Shakespeare's *Hamlet*. First published 1599 or 1600, Shakespeare's play is now in the public domain. Filmmakers like Kenneth Branagh or Franco Zeffirelli did not need permission to make their film versions of *Hamlet*. However, because the films of Hamlet by Zeffirelli (1990) and Branagh (1996) were unique expressions, these works do qualify for copyright protection.. New expressions of *Hamlet* can also be even more creative: In 1994, the Walt Disney Company created and copyrighted its own expression of this idea in the animated musical *The Lion King*. These expressions are just a few examples; there are numerous copyrighted expressions of this story. By protecting only the fixed original expression of an idea––but not the idea itself—copyright law encourages the creation of multiple original works based on a similar story, each with its own copyrightable expression.

Re-imagining works that are in the public domain is an important feature of copyright. This allows you to create your own version of *Hamlet* or any public domain work that inspires you.

> "Finding uncopyrighted material has led to some very creative decisions. Limitation leads to some really creative discoveries as well. Sometimes the barriers lead us to create some original things." **Robin McGinness**

In addition to understanding what can be copyrighted, it's important to know who owns the copyright to a work. Not every person who creates a work is the copyright holder. When you create something as part of your job, it could be considered a **work-for-hire** where your employer is considered the corporate copyright holder of that work. If you are the marketing manager at an arts organization and

4. U. S. Copyright Office, "Copyright Basics," *Copyright Office Circulars*, no. Circular 1 (September 2021), https://www.copyright.gov/circs/circ01.pdf.

you create a brochure for the upcoming season, that brochure is copyrightable. However, because you created it as an employee as part of your job, the arts organization is the copyright holder.

Today, many people know that new copyrights last for 70 years after the death of the creator. However, copyrights held by corporations last for 95 years from first publication or 120 years from creation if the work was never published. These different copyright terms add a layer of confusion to understanding when copyright expires. It can be even more confusing to determine the copyright status for works created in the 20th century. Throughout the 1900s, Congress lengthened the term of copyright repeatedly a number of times.[5] For works published before 1978, the copyright term may be shorter than for works created after January 1, 1978.

Thankfully, the public domain grows as the copyright of protected works expires every year. At the time of this book's publication, in 2024, everything published *before* 1929 is in the public domain. Each year on January 1, copyright expires on more copyrighted works. Works may enter the public domain sooner: because of technicalities, copyright has expired for some works published before 1964. Cornell University's library has a very useful copyright guide to help you understand when it might be appropriate to do more research on a work's copyright status.

Another critical copyright basic is understanding the exclusive rights covered by copyright. We often talk about copyright law as one thing, but in the United States, copyright is a bundle of exclusive rights. As a copyright holder, you control these exclusive rights in works you create:

1. Copy texts or recordings.
2. Distribute copies or recordings.
3. Publicly display literary, musical, dramatic, and choreographic works, pantomimes, and pictorial, graphic, or sculptural works.
4. Publicly perform literary, musical, dramatic, and choreographic works, pantomimes, and motion pictures and other audiovisual works.
5. Make derivative works based upon the work.
6. Publicly perform sound recordings via digital audio transmission.[6,7]

If you want to copy, perform, distribute, display, or adapt a work that you do not own the copyright to, you need to get permission from the copyright owner to engage in any of these activities. That permission generally comes in the form of a license that may or may not require you to pay a fee. It also means that if you transfer your copyrights to a publisher, record label, or other entity, they will be the ones to exercise these exclusive rights or decide who is granted permission to use your work. If you know these basics, you can get started on identifying any areas where copyright might impact your research-creation projects. Familiarity with these basic concepts can also help you streamline your consultation of legal counsel to make the best use of professional legal services for your project.

These basics cover what requirements a work should meet to be copyrighted, how long that copyright

5. "Timeline 18th Century | U.S. Copyright Office," accessed August 8, 2023, https://www.copyright.gov/timeline/timeline_18th_century.html
6. This exclusive right was added to copyright law in 1995 with the passage of the Digital Performance Rights in Sound Recordings Act. "Federal Register: Digital Performance Right in Sound Recordings...," accessed February 20, 2024, https://www.copyright.gov/fedreg/2005/70fr6736.html.
7. U.S. Code § 106 - Exclusive Rights in Copyrighted Works," LII / Legal Information Institute, accessed August 8, 2023, https://www.law.cornell.edu/uscode/text/17/106.

lasts, and the exclusive rights a copyright holder controls in their work. While it seems straightforward and inclusive, by requiring work to be original and fixed, the U.S. copyright system also omits some voices in the system. We learned in Part 1: Research Foundations that the ways that archives are constructed, how we classify information, and even the methodologies we use can exclude some voices and traditions in our information world. This is true with copyright, too.

Dr. Kimber Thomas from the Library of Congress has begun to articulate some of the ways we see our copyright system perpetuate oppressive systems like racism.[8] Folklore and other oral traditions cannot be copyrighted without conforming to requirements designed to protect intellectual property developed in White European cultures. Her work also demonstrates how other aspects of copyright, like the work-for-hire doctrine, perpetuate institutional systems of oppression by giving ownership of copyrighted works to corporations rather than individual creators or communities (where authorship may be constructed communally and not by individuals).

Like Johnston and Marwood's action heritage research methodology, Dr. Thomas' work invites questions about how we may want to think about long term reform of our copyright system to make it inclusive of different kinds of knowledge production traditions.[9] Dr. Thomas' work and the work of other scholars also invites us to consider not only the copyright issues when using copyrighted work in our research-creation, but also any ethical issues that copyright might not address.

Copyright in Research-Creation Projects

Sebastian and Clara have been tasked to think through some of the copyright issues our musician-scholars need to identify in this project. They know their project's source material is in the public domain. In addition, Luis has been working on identifying archives that might make primary sources available online.

Because they are using songs in the public domain, Sebastian and Clara know they won't need copyright permission to use the music. However, they want to touch base with Hyo-Eun and Luis for help with ethical approaches. They want to make sure there is a shared understanding among group members about how each culture traditionally and ethically shares their folk songs and folk tales. Considering ethical approaches in combination with following the law is important to the musician-scholars in the group.

8. Dr. Kimber Thomas, "Copyright and Racism," accessed December 4, 2023, https://docs.google.com/presentation/d/1raBmfpekZH51cXpgYHwYcSES_0GTJ8RdPOkNOOTuM1k. available under CC-BY-4.0 license
9. Thomas.

7-1. Dig Deeper

Review your current research-creation project. This can be research from any frame of your creative process: research to create a performance, research inspired by a performance, research conducted as performance, or research that is creatively presented.

List the copyrightable elements in your project. These can be other copyrighted works that you are using or copyrighted works you are creating.

- Who holds each copyright? Is it you or someone else?
- What exclusive rights do you need permission for to complete your work?
- In addition to copyright questions, do you have any ethical questions about using these copyrighted works?

Using Copyrighted Musical and Dramatic Works

Now that you have knowledge of these copyright basics you can begin to see where copyrights are involved in your research-creation project. Whether your project entails planning a traditional performance in the concert hall, developing a new multi-media work, or just sharing a performance from the bus stop on social media, there will be copyright considerations you need to address. Now we will look at how exclusive rights are managed in our copyright system and how you need to secure permissions to use copyrighted works.

First, it's important to remember that in the performing arts, we are almost always dealing with more than one copyright. When you listen to a song on Spotify or Apple Music, there can be as many as three copyrighted works being shared: the musical composition, the sound recording of the musical composition, and the lyrics. These copyrights may be held by three separate copyright holders. Du Yun's 2021 opera *In Our Daughter's Eyes* comprises music by the composer and a libretto by Michael McQuilken. If a recording is released on Sony Classical, the record label is likely the copyright holder of the sound recording. If you then wanted to use that recording in a project highlighting the impact of Chinese American composers, you would need to consider all three copyrights separately.

When you consider the complications of multiple copyright permissions to use one work, you may start to feel overwhelmed by how complicated our system is. It seems to easy to share copyrighted musical works online, but when we examine the copyright landscape, there is a complex web of licenses and permissions that make this possible. Music copyright law has evolved and adapted to respond to new technologies to make this seem easy. Some understanding of this complex system will help you avoid pitfalls in sharing your work in existing and emerging platforms.

The following sections cover the ways that copyright law has defined the permissions you need and created some systems that streamline those permission processes when performing copyrighted music in public or sharing those performances online.

Public Performance Licenses

Public performance licenses are required for every nondramatic performance in front of an audience whether it is live in-person or broadcast online. The law defines a public performance as a performance

that happens at "a place open to the public or at any place where a substantial number of persons outside of a normal circle of a family and its social acquaintances is gathered" when performed in person.[10] Online, it defines a public performance as one where the performance is transmitted to members of the public whether they are in the same place or separate.[11] That means that if five people are sitting alone at home in different cities listening to a song streamed on Spotify, it is a public performance, even though each of them is listening alone with no other audience members.

Public performance licenses cover musical compositions and sound recordings. In most cases, venues and platforms will have these licenses in place. In the U.S., the licenses are managed by a kind of **collecting agency** called a **performing rights organization** (PRO). The most well-known PROs include ASCAP, BMI, SESAC, and GMR for public performances of musical works, and SoundExchange for digital transmissions of sound recordings on satellite and internet radio.[12] These agencies provide blanket licenses to bars, concert halls, and even universities that allow them to publicly perform large catalogs of copyrighted works. PROs collect the licensing fees for these blanket licenses as well as for individually licensed public performances and distribute those royalties to songwriters, publishers, performers, and record labels.

When a copyright holder registers a work with a PRO, venues and platforms with licenses do not need separate permission to publicly perform each of the works available in a blanket license. It is important to know that public performance licenses remain limited to nondramatic performances of works that do not include staging, narrative storytelling, or props and costumes. Staged performances of musical works require additional rights—grand rights—which we discuss later in this chapter.

Public Performance Licenses in Action

If you are invited to give a recital or decide to perform at the local open mic, the venues are expected to have public performance licenses in place so that you don't need to secure permission to perform copyrighted works. It also means that when you want to livestream on Instagram or YouTube, you don't need to get a license for the public performance because the platform holds a public performance license. It is, however, important for you to do your research and ensure that the organizations and platforms that you want to use have the appropriate licenses in place.

Today, nearly all platforms where you can share and release music online, in addition to performing venues, have agreements with the major PROs we listed. Luckily for musician-scholars, platforms like Spotify, SoundCloud, and AppleMusic[13] have these licenses in place to cover any audio recordings you want to share of another creator's copyrighted music. However, streaming online also involves some of the other exclusive rights of the copyright holder we discussed, so there are additional licenses that you need to consider when releasing your research-creation projects online.

While musician-scholars focused on performing are primarily concerned with acquiring public

10. "17 U.S. Code § 106 - Exclusive Rights in Copyrighted Works."
11. "17 U.S. Code § 106 - Exclusive Rights in Copyrighted Works."
12. The copyright law currently does not provide copyright protection for sound recordings played on terrestrial radio or performed in public venues. So when you hear a song on your car radio or at a local restaurant, only [pb_glossary id="217"]**royalties**[/pb_glossary] for the musical work are collected and distributed.
13. Bandcamp.com is a notable example. If you are going to provide free streams to your releases there, you will need a public performance license.

performance licenses, if you compose original music, you will want to register your original compositions with a PRO to collect royalties. ASCAP and BMI allow any creator to register their works with them. The public performance royalties they collect are split between the publisher and the composer. If you work with a publisher, your publisher may register your work with your PRO for you. If you self-publish you work, you will want to understand how to register as the publisher and composer of your work. This process may differ among different PROs and may have different implications for how you structure your self-publishing as a business.

It is important to know that your work can only be registered with one PRO—you cannot register one work with BMI and the next with ASCAP. It can be difficult to switch from one PRO to another, so it is important to read through their membership rules carefully. Also, you generally can only be registered with collecting agencies in one country—reciprocal agreements will ensure that your works are listed, and royalties are collected in music markets outside of the country where you register.

For example, if you are registered with ASCAP and your symphony is performed by the Seoul Philharmonic Orchestra, you do not need to have your work registered in South Korea to receive royalties. The Korean Music Copyright Association (KOMCA) would send royalties to ASCAP for your performance.

As a performer, you should register any published sound recordings you release with SoundExchange to receive the performer's portion of any royalties from public performances of your sound recordings.

Mechanical Licenses

A **mechanical license** allows someone who is not the copyright holder of a musical work to reproduce that musical work on sound recordings. This is often thought of as a "cover license" because artists who generally record original music only need this license if they are covering another artist's song. Musician-scholars who perform in musical traditions where they perform music written by another composer—such as in Western classical music—will need this license to share recordings of copyrighted musical compositions. If you are a musician-scholar who often performs music that is copyrighted by someone else, it can be convenient to think of yourself as a cover artist.

Mechanical Licenses in Action

There are three ways to secure mechanical licenses. If you are the first artist to record a musical work, you will need a license directly from the copyright holder (generally the publisher or composer) to release a recording in any format. If you are not the first artist releasing a recording of a musical work and are releasing music on physical formats like CD, cassette, or vinyl, you can arrange for this license through the Harry Fox Agency's SongFile service. You will also need to comply with the U.S. Copyright Office's requirements for filing a Notice of Intent with the office.[14] If are unsure about doing this on your own, a service like EasySong can do this work for you for a small administrative fee.

However, if you are not selling physical media and are only distributing the sound recording for digital download or streaming, you may be covered if the platform already has a license from the Mechanical Licensing Collective (MLC). The MLC publicly posts the list of sites that have secured licenses. Notably,

14. "Section 115 - Notice of Intention to Obtain a Compulsory License | U.S. Copyright Office," accessed November 27, 2023, https://www.copyright.gov/licensing/sec_115.html.

Bandcamp is currently a **non-blanket licensee**, meaning that you still need to work with the Harry Fox Agency to secure licenses for that platform. Mechanical licenses only apply to the musical composition, so only composers or songwriters and their publishers receive royalties from these licenses.

Unfortunately, we are not done with licenses yet if you want to share your work on a platform that includes video such as YouTube or Instagram. Because a mechanical license only covers sound recordings, it does not cover multiple on-demand streams of copyrighted music synchronized with video—that requires one additional license, called the **synchronization license**.

Synchronization Licenses

Synchronization licenses, often just referred to as sync licenses, are required any time you synchronize copyrighted sound recordings to other audio or video recordings. This can include produced music videos, on-demand recital performances on YouTube, or music featured in a podcast. The sync license is the last step for musician-scholars who want to post performances of copyrighted music to a website like YouTube. Like mechanical licenses, sync licenses are also only required for musical compositions and only composers and publishers receive royalties from these licenses.

Synchronization Licenses in Action

These licenses can only be negotiated directly with the copyright holder. A good place to find the copyright holder's information is in the MLC database. You can also work with a licensing company that will secure a license for you for a small fee. There is no set rate for these licenses and it can take significant time to secure them. As a copyright holder, you may enter into these licenses directly as a copyright owner or your publisher may manage them for you.

Avoiding Takedowns

If you ensure these licenses are in place before uploading your performance to a platform such as YouTube, you may be surprised when YouTube sends you a copyright notice. This can happen when YouTube's Content ID system gets confused and matches your performance to an audio recording or composition in its copyright protection catalog. When a video is identified as containing someone else's copyrighted musical work or recording, the copyright holder can direct YouTube to take action against the uploader of the video. [15] This means a record label or music publisher can choose to mute the sound on your video, issue a takedown notice, or monetize your video.

Unfortunately, YouTube's ContentID system is notoriously unreliable.[16] Many classical musician-scholars struggle to share or monetize their performances of public domain music because of erroneous copyright claims that can be difficult to challenge.[17] However, it is important to continue to pursue

15. "Content ID for Music Partners - YouTube Help," accessed November 28, 2023, https://support.google.com/youtube/answer/2822002?hl=en.
16. Katharine Trendacosta, "Unfiltered: How YouTube's Content ID Discourages Fair Use and Dictates What We See Online," Electronic Frontier Foundation, December 10, 2020, https://www.eff.org/wp/unfiltered-how-youtubes-content-id-discourages-fair-use-and-dictates-what-we-see-online.
17. Krista L. Cox, "Takedowns Over Classical Composers Highlight Problems Of Automated Content Filtering - Above the Law," October 4, 2018, https://abovethelaw.com/2018/10/takedowns-over-classical-composers-highlight-problems-of-automated-content-filtering/.

your rights in these systems by challenging erroneous claims. Start by ensuring that you have all the licenses necessary to share the work you want to share; this preparation guarantees that you have a solid foundation to contest claims against your videos.

Master Use Licenses

A **master use license** is the license you need to use someone else's copyrighted sound recording. Master use licenses are commonly sought in conjunction with licenses for the musical work. They are required for using a copyrighted recording in a film or advertisement. A master use license can also be required for other specific uses, like sampling in a new multimedia work.

Streaming platforms pay record labels and distributors directly for this license. These licensing fees are negotiated directly with the larger labels and distributors or organizations like Merlin, a consortium representing a membership group of small independent record labels.

Master use licenses only apply to the sound recording. Licensees pay royalties for master use of sound recordings directly to record labels or distributors, who then distribute royalties based on recording or distribution contract terms.

Master Use Licenses in Action

Master use licenses must be negotiated directly with the copyright holder (generally the record label). Such licenses are difficult and expensive to acquire because there is no standard process or system to follow. Unlike mechanical licenses, where the U.S. government determines royalty rates, sound recording copyright holders can set any license fee that they want, which can make these licenses expensive to obtain. [18] This can be challenging when you want to use samples of sound recordings in your research-creation projects. It is becoming common for licensors to request composition credit in addition to a one-time licensing fee, which means they will also collect royalties on the composition moving forward.

Grand Rights

We know that PROs only cover public performances of nondramatic musical works. PROs also cover performances of copyrighted dramatic works that are excerpted and performed in a nondramatic context, like a single aria or song from a dramatic work. That means you can perform "Don't Cry for Me Argentina" at the open mic night if there is a public performance license. But if you want to propose performing the entirety of *Evita* with costumes, sets, and a jazz quartet, you will need **grand rights**. Grand rights are negotiated with the publisher or their agent. Grand rights are required for fully staged performances of any copyrighted opera, musical, or ballet.

Grand Rights in Action

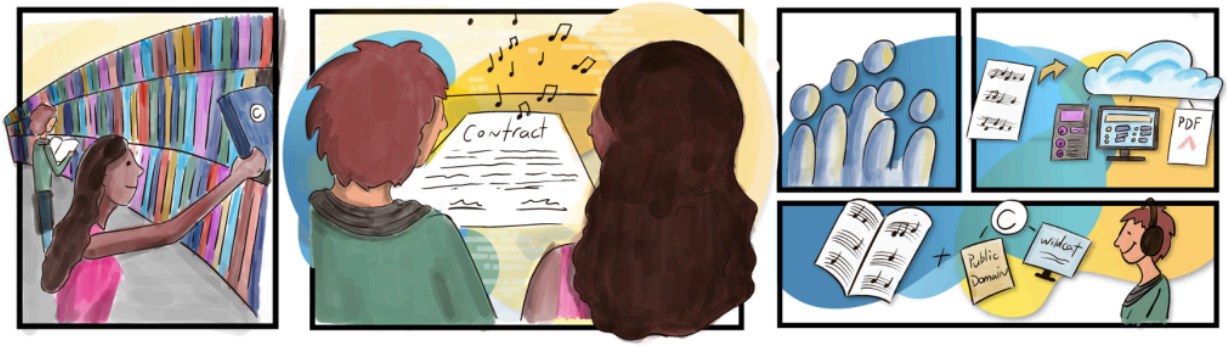
Grand rights are only required to perform the musical work. Generally, grand rights will be negotiated with the publisher or copyright holder directly. Rights systems like Zinfonia or licensing agents like

18. Jacinta Howard, "The Truth About Sampling, Credits, and Who Gets Paid," accessed February 20, 2024, https://rockthebells.com/articles/the-truth-about-sampling-credits-and-who-gets-paid/.

Concord Theatricals can help streamline the licensing process. Recording staged performances may also be negotiated when securing grand rights with the copyright holder. Royalties from grand rights are paid to the composer or songwriter and publisher.

When you publicly perform a nondramatic work, you have full artistic control over your performance. However, which elements can be changed in a dramatic work that is still copyrighted are controlled by the copyright holder. This is why grand rights need to be secured separately. In addition to giving you the rights to perform a dramatic work publicly, these licenses will let you know what elements of the original lighting, staging, choreography, costumes, or sets can be changed (or must also be licensed for use).

Breaking Down your Research Topic



Clara and Sebastian are thinking through any licenses that they might need for their project. Juliano has suggested to the group that it might be interesting to pair a modern song from each culture with a folk song: this would help them communicate the history of different cultures and how immigrant cultures in the U.S. draw upon their communities for inspiration to make new contributions to the culture today.

They aren't used to thinking about things from a popular music perspective as musician-scholars who met studying Western classical music. Sebastian is unsure of the libraries where they hope to perform their project have public performance licenses. Clara is going to contact them to find out more and determine if they need to look at public performance licenses for that part of the performance.

Conclusion

This chapter introduces copyright essentials for your research-creation work as a musician-scholar. Familiarizing yourself with copyright essentials prepares you for finding copyrighted resources and creating your own. Identifying a work's copyright status and knowing what licenses you made need to secure will help you execute your research-creation project. We also introduced you to some foundational ideas about how U.S. copyright system aspires to spur creation and innovation. Understanding the foundation of this system and some of the technical processes in its implementation prepares you to participate in shaping the future of a copyright system that respects the rights of creators while advancing your own artistic and research endeavors.

Key Takeaways

Understanding copyright helps streamline research, ensures ethical and legal use of copyrighted material, and supports advocating for a fair system benefiting creators and consumers.

Copyright knowledge can help you strategize how to search for information by knowing what works are freely available and in the public domain and what works are protected by copyright and accessible through libraries or fee-based access.

Copyright holders control exclusive rights like copying, distributing, displaying, adapting, and performing copyrighted works.

Musicians-scholars often express research through diverse mediums beyond traditional scholarly journals. This requires familiarity with specialized licensing systems that apply specifically to copyrighted musical works that you may need for your research-creation projects.

Beyond legal compliance, ethical considerations in using copyrighted works are vital. This includes acknowledging the creative input of others and being aware of potential biases in the system that might exclude diverse voices and traditions.

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8

COPYRIGHT EXCEPTIONS

Kathleen DeLaurenti

Copyright in the United States incentivizes the creation of new works by providing limited monopolies to copyright holders. These monopolies last for the duration of the copyright term and allow copyright holders to control the exclusive rights to a copyrighted work granted by copyright law.

In Chapter 7: Copyright Basics, we covered the basics of copyright law and the essential licenses that apply to musical works. These licenses serve as specific avenues for copyright holders to take advantage of their exclusive rights in musical works and sound recordings. But Congress recognizes that a monopoly without exceptions can sometimes undermine copyright's goal of encouraging and inspiring new work. Because of this flexible approach, there are some exceptions to copyright law that are important to understand.

A copyright exception allows you to use a copyrighted work without permission and without a license. When you include a quote from a copyrighted work in your research paper, you are exercising an exception to copyright called **fair use**. Exceptions to copyright law also allow criticism or negative reviews of copyrighted works; specific uses of copyrighted works in classrooms; and even allow the sale and purchase of used books and records. You probably encounter situations where an exception to copyright is happening every day without even noticing it.

The law also recognizes that individuals are not the only ones who need exceptions to copyright. Cultural institutions including libraries and museums have important responsibilities to foster long-term access to our many cultural heritages. To do this, libraries and archives can use exceptions to copyright that allow them to preserve, repair, or copy damaged out-of-print copyrighted works to ensure they remain accessible to students, scholars, and other library users.

In this chapter, we examine copyright exceptions that will help you manage your research-creation and teaching projects.

Fair Use

Fair use, Section 107 of the Copyright Act, is a provision that lets you use copyrighted works without permission in some situations. It is an exception unique in U.S. copyright law because it can apply to any use of a copyrighted work depending on the specific facts of the situation. Fair use asks that we analyze why we want to use a work in a particular way. If the use is reasonable based on factors outlined in the law, the use is fair. Many nonlegal experts can find fair use very confusing because there is no equation or test in the law to tell you when your use is a fair use and when it might be an **infringement**. This leads to many myths about fair use.

You might hear that "Fair use is a defense, not a right!" But if you read the law, the language is clear and easy to understand. Nowhere does it say that you must defend your fair use to a copyright holder in a court of law to ensure that it is fair. Novice musician-scholars often hear this phrase and are immediately concerned with being accused of copyright infringement. However, many researchers, news reporters, and teachers use fair use every day without having to defend their respective fair uses in court.

While many parts of the law are complex and can be difficult to understand, 17 U.S.C. Section 107 is quite readable:

> Notwithstanding the provisions of sections 106 and 106A, the fair use of a copyrighted work, including such use by reproduction in copies or phonorecords or by any other means specified by that section, for purposes such as criticism, comment, news reporting, teaching (including multiple copies for classroom use), scholarship, or research, is not an infringement of copyright. In determining whether the use made of a work in any particular case is a fair use the factors to be considered shall include—
>
> 1. the purpose and character of the use, including whether such use is of a commercial nature or is for nonprofit educational purposes;
> 2. the nature of the copyrighted work;
> 3. the amount and substantiality of the portion used in relation to the copyrighted work as a whole; and

4. the effect of the use upon the potential market for or value of the copyrighted work.

> The fact that a work is unpublished shall not itself bar a finding of fair use if such finding is made upon consideration of all the above factors.[1]

You might notice right away that many activities you engage in as a musician-scholar are cited in the law: Education, research, and scholarship can all be activities where you use fair use. This is not an exhaustive list and other activities can be fair uses, too.

The lack of a formula to determine fair use has led to the development of many guidelines to help the public understand when a use can be fair. These guidelines can be well-intentioned, but sometimes they perpetuate myths about copyright and fair use. Some of the most popular myths are that any educational use is a fair use; that if you only use 10% (or 30 seconds of a sound recording!) it is always fair use; or that any change to a copyrighted work makes it a fair use.[2]

Perhaps the most repeated myth about fair use is that all educational uses are fair uses. While there are many uses of copyrighted material in an educational context that could be a fair use, some are clearly not. For example, scanning and posting an entire theory textbook online for your students would ***not*** be a fair use. Even though education is a setting where the law says fair use can be employed, you still need to weigh the four factors in the law to determine fair use. While this use may be educational, textbooks and technique books are created specifically for teaching. Simply using these works for their intended purpose harms the market for these copyrighted works: They were created to be purchased by students and teachers for the classroom or other educational settings. When you use fair use as a rationale to share a textbook with your students, you are making a substitute for the copyrighted work in the marketplace. The fourth factor of fair use tells us that fair uses of copyrighted material *should not* substitute for the original in the market. This gives us some guidance on what kinds of uses are likely to be fair, and that a fair use should be adding meaning or context to the copyrighted item that extends beyond the reason it was created and made available for sale.

Another popular myth about fair use is that if your use is noncommercial, then it is a fair use. While it is true that court decisions have said that noncommercial use is favorable, that doesn't mean it is always fair use. Handing out copies of a copyrighted musical score at choir practice without purchasing every chorus member a copy is not fair use simply because your choir is a nonprofit. The noncommercial aspect of the first factor of fair use is not likely to outweigh the harm on the market.

However, legal decisions have, over time, developed an interpretation of the first factor of fair use that can be important for creators who want to take advantage of fair use. This interpretation says that when a use is "transformative," it is more likely to be a fair use. Judge Pierre Leval, a scholar who writes about transformative fair use, says that transformative uses are ones that utilize a copyrighted work as "raw material, transformed in the creation of new information, new aesthetics, new insights and understandings."[3]

1. "17 U.S. Code § 107 - Limitations on Exclusive Rights: Fair Use," LII / Legal Information Institute, accessed November 15, 2023, https://www.law.cornell.edu/uscode/text/17/107.
2. "Five Common Fair Use Myths," Ohio State University Libraries, February 22, 2023, http://library.osu.edu/news/five-common-fair-use-myths.
3. Pierre Leval, "Toward a Fair Use Standard," Harvard Law Review 103, no. 5 (1990): 1105–36.

One of the most noteworthy fair use cases involving music is Campbell v. Acuff-Rose.[4] In this case, Acuff-Rose, the publisher of Roy Orbison's song "Oh, Pretty Woman," sued the members of hip hop group 2 Live Crew, for using the melody of Orbison's song in their parody, "Pretty Woman." The case went all the way to the Supreme Court. The court ruled that 2 Live Crew's song was a parody that critiqued of Orbison's original. The transformative nature of the critique in their original song meant that it neither replaced nor harmed the market for "Oh, Pretty Woman."[5]

Some artists want to use other copyrighted music in sampling the way that Judge Leval describes: as raw material transformed in the creation of new musical works.[6] However, there is not much clear caselaw about fair use and sampling. That doesn't mean that there haven't been many lawsuits. In one of the very earliest lawsuits, *Bridgeport Music, Inc. v. Dimension Films, 410 F.3d 792 (6th Cir. 2005),* the court wrote "Get a license or do not sample. We do not see this as stifling creativity in any significant way."[7] The court did not consider fair use in this case, but because they said even the smallest sample is creative enough to require a license, many artists and record labels are hesitant to pursue fair use to sample sound recordings. Generally, record labels require artists to work with their legal teams to inventory and secure licenses for all samples.

Yet, artists like John Oswald[8] and Greg Gillis[9] have built their creative research on the practice of sampling without licensing. Both artists have spoken about the value of recorded sound as raw material in new works. Oswald and Gillis might even argue that the very fact that they have not faced lawsuits over their work indicates that their use is fair use. Decisions in other cases, including The 2 Live Crew case and a more recent lawsuit involving Drake,[10] do provide some guidance. The U.S. Copyright Office also indicates that there are some instances where sampling may be a fair use, stating, "In some cases, sampling, interpolating, or creating a mashup may be considered a 'fair use' and not copyright infringement."[11]

But there are risks to consider. Vanilla Ice paid steep penalties when the court found that his sample of Queen's "Under Pressure" used in his song "Ice Ice Baby" was too substantial and recognizable to be fair use.[12] When making decisions about fair use and sampling, it is important to understand any potential risks and consult your own lawyer to fully understand and document your decision-making process.

4. "Campbell v. Acuff-Rose Music, Inc.," in Wikipedia, September 27, 2023, https://en.wikipedia.org/w/index.php?title=Campbell_v._Acuff-Rose_Music,_Inc.&oldid=1177498083.
5. "Campbell v. Acuff-Rose Music, Inc."
6. Leval.
7. "The Song Remains the Same: A Review of the Legalities of Music Sampling," accessed November 15, 2023, https://www.wipo.int/wipo_magazine/en/2009/06/article_0006.html.
8. John Oswald, "Plunderphonics, or Audio Piracy as a Compositional Prerogative" (Wired Society Electro-Acoustic Conference, Toronto, 1985), https://www.plunderphonics.com/xhtml/xplunder.html.
9. Robert Levine, "Steal This Hook? D.J. Skirts Copyright Law," *The New York Times*, August 6, 2008, sec. Arts, https://www.nytimes.com/2008/08/07/arts/music/07girl.html.
10. "Drake Beats Appeal in 'Pound Cake' Sample Lawsuit," accessed November 15, 2023, https://variety.com/2020/biz/news/drake-beats-appeal-pound-cake-jimmy-smith-sample-lawsuit-1203491336/.
11. United States Copyright Office, "Sampling-Interpolations-Beat-Stores-and-More-An-Introduction-for-Musicians-Using-Preexisting.Pdf" (Washington, DC), accessed November 15, 2023, https://www.copyright.gov/music-modernization/educational-materials/Sampling-Interpolations-Beat-Stores-and-More-An-Introduction-for-Musicians-Using-Preexisting.pdf.
12. "Fair Use: The Four Factors – University Library News," accessed November 15, 2023, https://blog.library.gsu.edu/2016/02/23/50438/.

Nevertheless, there are many situations outside of sampling where using a copyrighted sound recording might also be a fair use. This is particularly true in teaching, where a sound recording may be a primary source of analysis and critique by students and teachers. Checklists and guides for fair use can be particularly helpful. When making decisions about fair use in the classroom, here are several useful resources worth exploring:

- Columbia University Fair Use Checklist [print version for download]
- The Ohio State University Fair Use Checklist [online interactive]
- Carrie Russell's Complete Copyright Guide to Copyright for K-12 Educators
- Center for Media and Social Impact Codes of Best Practices for Fair Use

Fair use checklists can help you understand how each factor can be specifically applied in your unique situation. Russell's book is an easy-to-read guide aimed specifically at educators who need to understand fair use in the classroom. The guides from the Center for Media and Social Impact focus on specific communities of practice and present real-life examples about how filmmakers, educators, and poets employ fair use in the course of their everyday practice.

Checklists like those listed here will not calculate a fair use answer for you, but these resources can help you assess and document the fair use rationale of your project.

8-1. Dig Deeper

First, use The Ohio State University Fair Use checklist to analyze the following fair use question:

Your choral ensemble is starting rehearsals for a new copyrighted work, but the copies you purchased are taking longer to arrive than expected. Rehearsals start tonight and you only have your personal copy. You want to make copies for the ensemble under the following conditions:

- The choral piece is copyrighted and published.
- Copies will only be used for one rehearsal and collected afterwards.
- Only members of the ensemble performing this work will have access to rehearsal copies.
- You have already paid for a copy for each choir member to use for later rehearsals and performance.

Next, explore the Documentary Filmmakers Statement of Best Practices for Fair Use to see if it helps you understand this fair use question:

You are creating an installation focused on listening in your community. This is a grant funded project; your city arts department is paying you to make recordings of the soundscape of every neighborhood that will be installed for listeners in local libraries. Your compositions consist of your own original work interwoven with the sounds that you collect from different neighborhoods. You notice that in a recording of a basketball game, Jay-Z's music is playing from a radio. You think that including this might be a fair use.

If you have questions or concerns about utilizing fair use, you may want to consult legal counsel. Many musician-scholars are concerned about the costs of engaging a lawyer, but the Volunteer Lawyers for the Arts are available to help. The Maryland Volunteer Lawyers for the Arts have expertise to help you understand how to responsibly bring fair use into your artistic practice.

First Sale

The first sale doctrine defined in Section 109 of the copyright law, often simply referred to as "first sale," makes a distinction between the expression of creative ideas in a copyrighted work and a physical copy of that work. For example, we know that musical works are protected by copyright. However, as a musician, when you buy a copy of a physical score, you are not buying the copyright to that musical work. You are only buying one physical copy of that musical work.

This means that you are free to dispose of that single copy in any way you want—trading, lending, gifting, etc.—without any permissions from the copyright owner. By contrast, it also means that you cannot copy the music on the pages, perform it or display it publicly, or exercise any exclusive rights of the copyright holder without permissions. This section of the law is incredibly powerful. Without it, libraries would not be able to lend books, and used book and record stores could not exist. Usually, this is part of the law that we take for granted, especially when looking for used scores or textbooks. But the growth of digital publishing has brought first sale back into the spotlight.

In 2012, a newspaper erroneously reported that actor Bruce Willis was going to sue Apple because the terms of service prevented him from leaving his iTunes music collection to his family in his estate plan.[13] While the lawsuit never happened, it brought to light an issue that consumers are increasingly concerned with about digital media: not owning the files we "purchase" means that we may not be acquiring the digital collections we think we are.

The Willis hit the news the same year that ReDigi, a marketplace to resell digital music, books, and games, was being sued by Capitol Records.[14] Despite ReDigi's claims that a single file was sold from one verified user to another without leaving copies, Capitol Records called it a "clearinghouse for copyright infringement."[15] The judge didn't quite agree, but the ruling said that digital technology requires copying, and that when a file is moved from one user's hard drive to another, it copies that content in a way that violates copyright law and isn't covered by first sale.

This has a few implications for musician-scholars. First, it complicates the way that we use private collecting as a part of our research-creation practice. You can no longer own your digital collections the way you own DVD, CD, or vinyl collections. Copyright holders are only providing you with a license, even when you click the Buy Now button on Amazon Prime.[16] In a recent example, anime fans and scholars were shocked when Sony announced that content Funimation users thought they had purchased permanent online access to on the Funimation platform was no longer going to be available to them.[17] This becomes even more concerning when you realize that libraries cannot even purchase

13. Oscar Raymundo, "Bruce Willis Did Not Sue Apple This Week," Rolling Stone (blog), September 5, 2012, https://www.rollingstone.com/culture/culture-news/bruce-willis-did-not-sue-apple-over-his-itunes-library-186714/.
14. David Kravets, "Online Market for Pre-Owned Digital Music Hangs in the Balance," Wired, accessed November 20, 2023, https://www.wired.com/2012/02/pre-owned-music-lawsuit/.
15. Kravets.
16. "Column: Consumer Deception? That 'Buy Now' Button on Amazon or iTunes May Not Mean You Own What You Paid For," Los Angeles Times, October 19, 2016, https://www.latimes.com/business/hiltzik/la-fi-hiltzik-buy-now-20161019-snap-story.html.
17. Scharon Harding, "Sony Is Erasing Digital Libraries That Were Supposed to Be Accessible 'Forever,'" Ars Technica, February 8, 2024, https://arstechnica.com/culture/2024/02/funimation-dvds-included-forever-available-digital-copies-forever-ends-april-2/.

access to this kind of content, such as documentaries and films only licensed for streaming platforms. When Sony decides to remove content from a platform, it could potentially be lost forever because libraries do not have copies that can be preserved for researchers.

This is also important when you are making your own work available digitally. If you are selling sound recordings on Bandcamp or PDFs of compositions on your website, the user buying that item cannot sell, lend, or trade that file to anyone else. For individual users, this may not be important. But libraries may not be able to purchase your work for their collections. Libraries can be important tools for musician-scholars who want to explore new programming; having your work in library collections can lead to unexpected performances and ensure your work can be preserved for the future.

Using Copyright Exceptions in your Research-creation

Sebastian has learned from Clara's investigation that the libraries where they plan to perform do not have public performance licenses. Before they approach a PRO for a public performance license, Clara suggests researching some copyright exceptions to determine if they apply.

First, they use The Ohio State University Fair Use Checklist to decide if this performance might be a fair use: The songs are creative works; they are performing entire songs for a public audience; and while our musician-scholars believe their project creates a new understanding of the songs, they aren't really transforming the songs by using them as examples of different cultures. These factors seem to weigh against fair use, even though they won't be charging admission.

Sebastian remembers that there can be an exception for public performances, though, for nonprofit nondramatic performances. While they do plan to share some stories, they aren't planning scripts, costumes, sets. They are imagining those stories as interludes between the group performing the songs on their own. Sebastian and Clara decide to explore more about this exception to see if it might be appropriate for their project.

Exceptions for Public Performances

Section 110 of the U.S. copyright law outlines when you can perform or display works without permission from the copyright holder. In this section of the law, Congress recognizes that in some situations, a public performance or display should not need prior permission. These situations may include teaching, religious services, state fairs, playing music in record stores, and more. Here are three exceptions that most musicians should know about.

One of the most important public performance exceptions for musicians to understand is the classroom

exception covered in Sections 110(1) and 110(2).[18] The classroom exception for in-person teaching states that you can display or perform any legally obtained copy of a copyrighted work in a classroom at a nonprofit teaching institution. The nonprofit part is important: Many community music schools are **not** nonprofit institutions, so if you are teaching there, you may need to rely on fair use for similar kinds of teaching activities.

You might assume that this remains the same in the online classroom. However, Section 110(2), sometimes called the TEACH Act, is much more complicated. It allows for only performance of limited portions of a work. There are also a series of requirements that your employing institution must follow for instructors to take advantage of this part of the law. That doesn't mean that you don't have the right to fair use, though! A fair use analysis will help you make that determination. The Music Library Association created a statement about digital transmission of audio recordings that discusses why this activity can be a fair use and the reasons that an instructor might need to make an entire work available to students for study.[19]

The second exception that you may need to know about is Section 110(3). This part of the law says that you can perform non-dramatic musical works, dramatic works of a religious nature, or display a work during the course of a religious service.[20] This means that if you are hired to perform music as part of a religious service, neither you nor the religious organization need to acquire performance rights to the music performed during a service. However, it is common for places of worship to host musical performances that are not part of a religious service. This exception does not cover those performances. So if you are presenting a recital that happens to be at a house of worship but isn't part of a religious services, you will want to talk with the organization to make sure the appropriate licenses are in place.

The last part of Section 110–Section 110(4)–is the exception that many musicians have never heard of at all. This section of the law allows for nonprofit performances of nondramatic works without a public performance license. There are some restrictions on this: The performance should not be primarily for an organization to directly or indirectly benefit financially; no organizers, performers, or promoters can be paid for the performance; if there is an admission price, any funds collected after productions costs must be used exclusively for educational, religious, or charitable purposes; and the copyright holder of a musical work can make an objection to the performance by following the direction outlined in the law.

Does this mean that you will never need a public performance license if you're not being paid for a gig? Not quite. But if a nonprofit invites you to perform a recital for a concert series where you agree to perform without a fee, and any funds from ticket prices are donated to the host nonprofit organization, it would qualify under this exception. However, the exception would not apply for a show where any ticket fees were collected and split with performers and producers directly, even if it's hosted by a nonprofit organization.

18. "17 U.S. Code § 110 - Limitations on Exclusive Rights: Exemption of Certain Performances and Displays," LII / Legal Information Institute, accessed November 20, 2023, https://www.law.cornell.edu/uscode/text/17/110.
19. "Statement on the Digital Transmission of Audio Reserves – Copyright for Music Librarians," accessed November 20, 2023, https://copyright.wp.musiclibraryassoc.org/digital-transmission-of-audio-reserves/.
20. "17 U.S. Code § 110 - Limitations on Exclusive Rights."

Conclusion

In concluding our exploration of copyright exceptions, it's essential to reflect on the role these exceptions play in balancing the rights of creators with the public's interest. These exceptions, including fair use, first sale, and specific provisions for libraries, archives, and public performances, serve as crucial mechanisms that ensure the flow of knowledge, culture, and innovation. They allow educators, students, artists, and researchers to use copyrighted works in ways that contribute to education, scholarship, and creative expression without stifling their ability to engage critically with the world around them.

Understanding and applying these exceptions requires careful consideration and, at times, legal consultation. But they are designed to empower you to work within the law while pursuing research-creation projects. Armed with knowledge and respect for both the letter and spirit of copyright law, you can confidently engage with copyrighted works in a manner that enriches your work and respects the rights of creators.

Key Takeaways

Fair use, first sale, and exceptions for teaching and public performance are important parts of copyright law to understand.

Using exceptions to copyright often requires meeting specific conditions outlined in the law. It's important to review those conditions and apply exceptions to copyright correctly.

If you are teaching at a community music school, K-12 school, or university, your institution will have guidelines to instructing you on their policies for applying copyright exceptions.

When you think that taking advantage of fair use or a public performance exception is critical to your research-creation process, but feel uncertain about applying the law correctly, seek no-cost or low-cost legal counsel to guide your decision making.

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9

COPYRIGHT: AN EXPERT PANEL

Kathleen DeLaurenti

Our expert panel of musician-scholars have a variety of experiences with copyright in their work. They have engaged with the copyrighted work of others, leveraged the public domain, and engaged with how exceptions to copyright law work in different contexts.

Many musician-scholars like Christina Farrell and Kyoko Kitamura also express concerns about how complicated and necessary it is to have a basic understanding of copyright:

"I don't feel like I'm well informed about copyright. Admittedly, it's something that I probably just try to avoid dealing with." **Christina Farrell**

"There's a disconnect now with copyright law because it's such an old concept. It grew partially out of the printing press, right? Now there's no physical barrier to copying digital material. We're obviously in a very different place. It's so complicated. Simplicity, convenience, people understanding what it's about is really important. I don't think we're there." **Kyoko Kitamura**

When copyright expires and a work enters the public domain, we have new creative opportunities to engage with that work. Our expert panelists have found rich opportunities to leverage public domain materials to develop new work.

"I would say that thinking about finding uncopyrighted material has led to some very creative decisions in my past. I wrote a whole bunch of songs for my undergrad recital that were based on the Apollo 11 mission. And of course, one of the wonderful things about NASA is all their material is public domain. I could take and use as text all the transcripts from that mission and that's all totally free to use. Getting to figure out ways that I could find stuff that was historical material that was free to use was a really great experience that led to a collaboration with a staff person at NASA who got me connected with them and actually helped me digitize some as of yet undigitized film… At the same time, limitation leads to some really creative discoveries as well. Both the barriers aren't that high, but sometimes the barriers lead us to create some original things." **Robin McGinness**

Musician-scholars are also uniquely poised to understand how complicated it is having a balance in our copyright system. Because we are often creators and users of copyrighted works, we know that there are opportunities and challenges with the way that copyright impacts our creative research. Our experts are considering why copyright was created and how the system is impacting musicians, listeners, and researchers.

"Well, the problem with copyright is it's all talking about money, isn't it? Now that we've had these critical editions of composers—finally, for instance, Florence Price and Samuel Coleridge-Taylor—it's wonderful to see their music, of course, published more and readily accessible. That's the pro, that we're getting it in the hands of organizations like we've never seen before. However, the restrictions that come sometimes with publications are difficult. The way the edits are sometimes made in a piece may not be at the highest standard, and it makes my job difficult. The frustrating side as a conductor if it's only given rights to one publisher, then there's no room for edits, there's no freedom of that. So that's the side of frustration. But to be able to see this music disseminated at such a fast rate is thrilling." **Jonathon Heyward**

"I want to have the copyright of my recording or, if it turns up in something, someone uses it, I want to know that it has been properly credited to me and to my collaborators for the chamber music. It also brings up the issue of scores. The music that I dig up, perform, and record hasn't been published in modern scholarly editions. These composers deserve to have a nice-looking A-R edition or *Musica Britannica* edition of their work as well. If you're going to the library and you

find Purcell, Handel, and William Boyce, should there also be an Elizabeth Turner volume there? I think that there should. Should that volume cost $150? I don't think so. That's where I start to have significant questions about the publishing process.

I'm working on two separate recording projects right now. Should I release them on a label? Should I self-release them? How should they be available? What is the best way to go about making sure that for that work, a significant amount of artistic work is protected? I haven't completely made up my mind yet on how I'm going to navigate those challenges because the music has never been recorded before. These will be first recordings of pieces." **Paula Maust**

"I am not very good at copyrighting my music or doing all that on the to-do list of the musician to get everything registered. But you know, one time, I made $30 from music distribution. That was really exciting. That was about 15 years ago. The only thing I've otherwise had a lot of experience with is things being published behind paywalls. So I personally, I'm willing to send anybody a PDF. I feel like most of my colleagues feel the same way. We've also had challenges with republishing because people want to republish things ad nauseum, and they don't want to recommission, they don't want to work with you to make something new and relevant to what you're working on. It's connected to this copyright thing where people would rather republish something and not pay, than commission new work." **Suzanne Kite**

"Copyright has come up in different ways as I've worked with teaching artists across the country and in the communities of teaching artists. In my work, my goal is for people to use my lessons. There is a little copyright statement at the bottom of my lesson plans, but I want people to use them. I appreciate and encourage people to put my name on it if they're using a song that I wrote or something in that lesson plan. If I borrow something from another teaching artist, I put, 'This was by this person.'

"But in many ways, copyright would be a barrier to that goal, right? If I were particular about controlling who gets to use my lesson plans, it would be a bit of a barrier. I do know teaching artists who have developed very formalized curriculum packages. The work that I do tends to be very one on one. I create it just for the moment, right? I may or may not ever use that lesson plan exactly like that again. But other teaching artists have developed and invested a lot of time and energy in creating an entire curriculum kit, for instance, that has procedures and names for things and logos for things. Some teaching artists do have a much stricter feeling about copyright and the importance of copyright.

"There are two different approaches, and they're both valid. I know also that there have been concerns among musicians in particular who will teach a lesson that's a one-off lesson they're creating just for that classroom experience. But they're going to use a song that's on an album that they wrote, for instance, or that they have copyright for. I know some artists have had some conversations around what's appropriate in terms of copyright and sharing. Do we ask teachers to pay for that song if they're going to use it in the classroom? What's the right approach? There's a lot of remaining questions about that in the field of teaching artistry that I don't have all the answers for, but I know that it continues to be a question." **Christina Farrell**

Our experts are also aware of exceptions that exist in copyright law and how to use them in the work.

> "Copyright is one important tool in making sure that folks get credit for their original work and helps prevent that work from being exploited. Copyright has a place, but it can also be a barrier for folks who want to engage with original work in certain kinds of ways. There's a tough balance in terms of my scholarship and publications.
>
> "Most of the material I engage with is copyrighted. When I engage with copyrighted material in terms of songs, my use generally falls under fair use. I haven't really encountered a lot of barriers. I picked a press that was really committed to fair use to engage with copyrighted material.
>
> "But I am cognizant of not using too much copyrighted material, like too many lyrics from one song. In some ways, this has helped me to be clearer when I'm making an argument about a particular song and only using the parts of the song that are especially necessary. I'm not just reprinting entire song lyrics. Rather, this moment is especially important—this is why, or this is a particular example of a phenomenon I'm talking about. It has in some ways helped me to be clearer and more concise. Copyright has not been a huge issue." **Lauron Kehrer**

They also have concerns about how copyright is impacting different communities and how Western ideas of copyright can impact the way that the system is implemented. Additionally, they also grapple with ethical issues. Sometimes just because we can do something under copyright law doesn't mean that we ethically should do it.

> "Sometimes the legal use of copyrighted material does not always align with the ethical use of copyrighted material. For example, I've written about instances in which artists—who have a lot of resources, major labels, a lot of financial resources—can get sample clearance or legal permission to use preexisting work in their own work, especially work by black LGBTQ artists. But they tend to use that material in a way that often erases the queer esthetics and the queer meanings of the original source material.
>
> "For me, this is a bit of a concern because queer artists already face a lot of barriers in terms of getting their music into the mainstream, getting people engaging with it. While their work might be engaged with, it is recontextualized in a way that they no longer have control over. This is an issue because of the larger social issues of homophobia and transphobia, and the way that queer lives are already invisible in a lot of ways. It's not necessarily the use of preexisting material but the way that material is being reworked, even if it's with credit, even if they pay the artists. It's being recontextualized in a way that erases some of that queerness, which I think is problematic.
>
> "At the same time, I work on hip hop, which historically is the style of music that originated by the creative use of repurposing and recontextualizing preexisting records. Hip hop was the dominant production style for a very long time, and we've seen now, the legal apparatus has cracked down on sampling without permissions. It's pushed artists to create in different ways.
>
> "But now it has created a production hierarchy where artists like Beyoncé, who has the means, can sample hundreds of artists on an album legally with permissions and writing credits. That's great, but an independent artist who doesn't have that label backing or financial resources cannot engage with those same samples because they just can't afford it. This has created a hierarchy in

which artists who have the resources can repurpose certain kinds of material. The artists who don't have the resources can't.

"I don't know what the answer is; I don't have to come up with the answer. I examine and talk about what this practice is doing. We have to be cautious in how we think about copyright and how we find the balance between artists maintaining credits and control of the material that they create. In acknowledging that creativity, how do we also make it so that it's possible to engage with that material in certain ways? How are we stifling creativity in certain ways? Those are some things I've encountered in my research, and it's tricky." **Lauron Kehrer**

In this chapter, we have explore the multifaceted perspectives of musician-scholars on copyright's complexities and its impact on creative work. Our experts have a variety of experiences: from Christina Farrell's admission of avoiding copyright issues to Kyoko Kitamura's insights into the challenges of copyright in the digital age, we can see the ways copyright impacts musician-scholars working in all modalities of research creation. As creators and consumers in the digital era, musician-scholars navigate a landscape where legal, ethical, and practical considerations intertwine, presenting both obstacles and opportunities. This dialogue underscores the ongoing need for musician-scholars to educate themselves about copyright essentials so that they can engage with, and at times help reform, copyright law.

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PART III

PUBLISHING PRACTICES

10

PUBLISHING AND ACCESSING INFORMATION

Kathleen DeLaurenti

One of the great promises of the internet was that information could be widely accessible to everyone at low or no cost. Anyone seeking knowledge could learn from low-cost but high-quality online **resources**. And while it may seem that everything is and has always been online, much of the 1,000-year publishing history of printed musical scores, **scholarly journals**, and **scholarly books** remains available only in libraries and archives.

In addition to making the vast history of human knowledge available online, the competing interests of publishers, authors, and consumers seem to be more at odds now than ever. Unlike the print

environment, the digital environment works on technologies that make sharing easy. This change has been welcomed by consumers, but is a concern for publishers and some creators who worry that digital piracy will undermine their business model.

One ongoing development is the move to stop selling born-digital media to consumers and libraries. Concerned that digital content cannot be easily controlled, large publishers of books, music scores, and sound recordings continue to move to a leasing model. While this eases publisher concerns around piracy, it means that increasingly no one (including libraries) can collect and lend books or sound recordings.[1] At the same time, individual musicians and authors are embracing new technology; they are leveraging our connected information world to develop collaborative models for publishing that favor artistic control and building relationships with their audiences.[2]

Libraries, researchers, and creators are asking challenging questions as the future landscape for knowledge production and dissemination evolves:

- Who should own digital books, scores, or sound recordings?
- How do we maintain a record of our cultural history when libraries cannot collect books, articles, or sound recordings?
- What role should creators have in deciding how their work is published and shared with their audience?
- What is the value of collecting when digital media is platform dependent and publishers can modify or delete the content on those platforms at any time?
- What will the future of memory institutions or private collections be if publishers and copyright holders prevent individuals and institutions from preserving these resources for future generations of scholars?

Scholarly Publishing

Much like learning copyright basics, understanding some basics about publishing can help you understand the intersections between published works, copyright, and access to resources. Knowing how works are published can even help you understand how they're organized online or in **catalogs**. As we discussed in Chapter 4: Preparing to Search, the kinds of search tools we have are a reflection of the way historical publishing practices have been adapted to online environments over time. For many, an ideal world wouldn't even have online **indexes**: we would simply have digitized access to all knowledge created through human history.

In many ways, today's online information environment specifically reflects Western European publishing practices. The first scholarly journals in Western Europe date back to the 17th Century.[3] However, in China, a burgeoning publishing industry was active as early as 1030, when the government

1. "The Anti-Ownership Ebook Economy," accessed November 7, 2023, https://nyuengelberg.org/outputs/the-anti-ownership-ebook-economy/.
2. "About the Brick House Cooperative," The Brick House Cooperative, accessed November 7, 2023, https://thebrick.house/who-we-are/.
3. "Scholarly Publishing: A Brief History | AJE," accessed November 7, 2023, https://www.aje.com/arc/scholarly-publishing-brief-history/.

adopted block printing technology to distribute Confucian teachings widely.[4] While publishing industries across the globe evolved differently, today, a scholarly publishing system that centers European traditions has become dominant. This includes a **peer-review** process that has not changed much since 1731, when the Royal Society of Edinburgh published the first peer-reviewed scholarly journal *Medical Essays and Observations*.[5]

In 1880, Elsevier became the first for-profit publisher of scholarly journals.[6] Throughout the 20th century, the dominance of Western European scholarly publishing grew as publishers like Elsevier expanded in tandem with investments in research universities.

At this time, publishing involved significant labor and time. We can clearly see the time and labor investments in the traditional **information life cycle**: Newspapers with short articles that only required editorial review appeared first. Then came **scholarly articles** that required additional time in the publishing process for peer-review. Eventually, scholarly books that represent larger intellectual undertakings with longer review processes emerged. Before Wikipedia, you couldn't see a topic in an encyclopedia until enough scholarly articles and books had been published to deem it worthy of inclusion. Even today, Wikipedia's own editorial guidelines require content to be cited by published **secondary sources**, to be included on the website.

Before the advent of online publishing, publishers managed every aspect of the publication process except writing the actual scholarship and providing peer-reviews. Publishers had **editorial boards** that managed the process of selecting scholars who would peer-review the scholarly articles submitted by other scholars in their field. These peer-reviewers pointed out limitations to experiments; suggested other research that scholars should incorporate into their work; and made recommendations to the editors about whether the scholarship was good enough to publish. Publishers also hired designers, printers, and copy editors who made sure that these publications were error-free and ready for distribution. Scholarly articles were published together in issues that were sent to individual scholarly society members or subscribing libraries where they were available to researchers on a monthly, quarterly, or annual basis.

There was immense financial, labor, and time costs to this process. Scholarly articles were sent by mail to editors for consideration who then mailed them to peer-reviewers. The editors had to wait for those reviews to come back through the mail and return them to authors for revision. This process kept pace with technology, moving from handwriting to typewriters to computers. But in the early history of publishing, publishers had to make significant investments to cover the costs of postage, typesetting, and printing of these issues.

By the early 2000s, most publishers began moving their publications online and distributing articles in the portable document format, or PDF. In 2004, Google tried to index these publications hosted on scholarly publisher websites with a new tool called Google Scholar. With the launch of Google Scholar and publisher supported **research databases** and indexes, researchers no longer had to engage with an issue of a scholarly journal to access a single article. This is so common today that most novice

4. "出版史_百度百科," accessed November 27, 2023, https://baike.baidu.com/item/%E5%87%BA%E7%89%88%E5%8F%B2/12771008.
5. "Scholarly Publishing."
6. "Elsevier," in Wikipedia, October 24, 2023, https://en.wikipedia.org/w/index.php?title=Elsevier&oldid=1181714029.

researchers equate scholarly articles with PDFs because they have never interacted with them in any other format.

Understanding that scholarship was not always created as PDFs or posted on websites can be an important part of your research strategy. Accessing scholarly articles as single PDFs doesn't change the fact that each article is part of an issue that comprises a volume of a scholarly journal. In Chapter 4: Preparing to Search, we examine many different search tools. Understanding the relationship between a scholarly article, an issue, a volume, and a scholarly journal will also help you understand what you should expect to find when using these search tools. For example, Music Index, which indexes articles across hundreds of publications from different publishers, is generally a digital representation of a print index and may not have PDFs of the articles you want to read. On the other end of the spectrum, Oxford University Press' online database does include full-text content, but only from journals published by Oxford University Press. Knowing that you can find full text of Oxford scholarly journals on their platform can make finding an article you want to read easy. But Music Index is a better tool when you want to survey published scholarly articles across a topic that may have been published over time by a number of different publishers.

When you find yourself confused about which format a source might be available in or why you're not finding it online in an index or database where you expected it to be, here's what to do: Simplify your search process by stepping back to think through how it was originally made available and where a **copyright holder** or **archive** might continue to provide access.

Open Access

Traditionally, publishers charged subscription fees to cover the labor and materials necessary to publish print books and scholarly articles. Throughout history, scholars have provided peer-review services as well as their books and journal articles to publishers for free. Scholars are motivated to do this because it advances research in their field and demonstrates the value of their scholarship, an important part of securing tenure at a college or university. Profits have never been an important motivator for scholarly publishing. Historically, the fees for subscriptions have been paid by libraries motivated to ensure that researchers, students, and staff can read what other scholars are publishing.

Because scholars provide their work to publishers for free, you might think that a move to digital-only publishing and distribution platforms would become less expensive for scholars and libraries. In fact, many novice **musician-scholars** assume that publishers take advantage of the internet to make all of their published research available online for free.

However, as the University of California at San Francisco notes, costs of access to health sciences scholarly journals have increased by 87.5% since 2013.[7] These costs have profound impacts to you as a musician-scholar and what you might access online. Wealthier institutions can provide more research access to their students and researchers.

This can mean longer wait times for students and researchers at smaller institutions. It can sometimes mean no access at all for independent musician-scholars. The University of Colorado-Boulder reports

7. "Journals Cost How Much?," UCSF Library (blog), accessed November 27, 2023, https://www.library.ucsf.edu/about/subscriptions/journals-costs/.

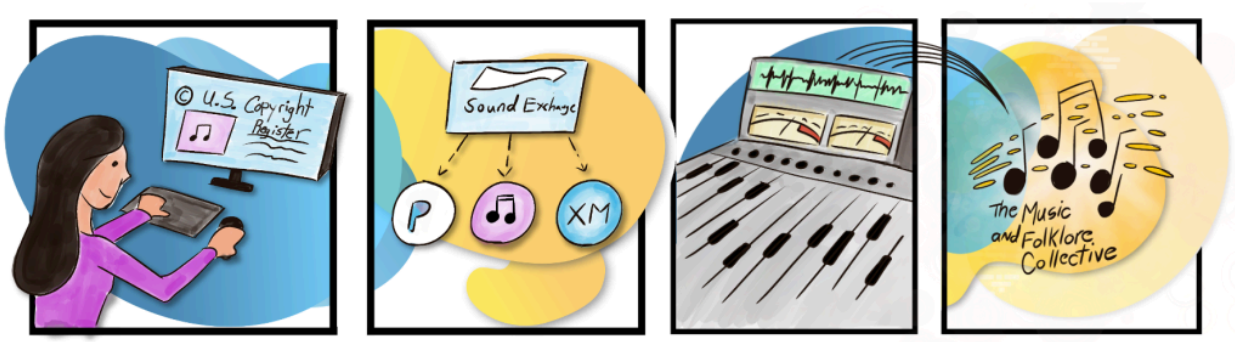
that an annual subscription to journals from the publisher Wiley costs more than buying a 92-foot luxury yacht.[8] This means that few public libraries are able to provide these resources to their communities.

In 2001, a group of scholars who wanted to take advantage of the internet to share scholarship more quickly and freely met in Budapest to discuss how to make this a reality through **open access** publishing practices. This resulted in the Budapest Open Access Initiative (BOAI).[9] This declaration was an important step that scholars took toward asserting that the research they freely contributed to the world should also be freely accessible to everyone. It was also the first time that open access was defined, declaring it was "economically feasible, that it gives readers extraordinary power to find and make use of relevant literature, and that it gives authors and their works vast and measurable new visibility, readership, and impact."[10]

Since the BOAI, scholars, libraries, and some publishers have been working together to identify ways to make more research open access. Many libraries now have institutional repositories where scholars can post fully edited versions of their work for students and their peers to access for free. Some libraries and publishers, including Project MUSE, are working together on new subscription models to make work openly accessible.[11] There are also open access initiatives driven by the European Union and the United States. Most recently, the President of the United States instructed the Office of Science, Technology, and Policy (OSTP) to work with all federal agencies that fund research to formulate policies that would require all federally funded data and research to be made open access the first day of publication.[12] This is critical in making more research accessible: in 2021, 55% of research in colleges and universities in the U.S. was funded by taxpayers in the form of federal grants.[13]

8. "Quiz: How Much Do CU Boulder Libraries Subscription Resources Cost?," University Libraries, September 30, 2020, https://www.colorado.edu/libraries/2020/09/30/quiz-how-much-do-cu-boulder-libraries-subscription-resources-cost.
9. "Budapest Open Access Initiative," accessed November 27, 2023, https://www.budapestopenaccessinitiative.org/.
10. "Budapest Open Access Initiative."
11. "Project MUSE," accessed December 12, 2023, https://about.muse.jhu.edu/muse/s2o/.
12. The White House, "Memorandum on Restoring Trust in Government Through Scientific Integrity and Evidence-Based Policymaking," The White House, January 27, 2021, https://www.whitehouse.gov/briefing-room/presidential-actions/2021/01/27/memorandum-on-restoring-trust-in-government-through-scientific-integrity-and-evidence-based-policymaking/.
13. "Universities Report Largest Growth in Federally Funded R&D Expenditures since FY 2011 | NSF - National Science Foundation," accessed February 19, 2024, https://ncses.nsf.gov/pubs/nsf23303.

Expanding Your Research-Creation



Research-creation projects often extend beyond a single performance or information need. Luis has been passionate about finding opportunities for their project to have an impact beyond Baltimore City audiences. Clara agrees and suggests that she and Juliano can continue to explore the copyright issues related to sharing the group's work online.

Inspired by the idea of open education resources (OER), they decide to use this opportunity to create a new OER. Sharing is at the heart of their project, so OER seems like a good vehicle to share their work while allowing others to build on it and contribute additional cultural perspectives.

Our musician-scholars hope to make their folk song arrangements, translations of the text into multiple languages, and images that they commissioned as part of the project website.

Open Education

Open access is a model that generally focuses on publishing and sharing scholarly articles. But the textbooks that many musician-scholars rely on for their learning have also seen price increases that have made it hard for some students to afford required course materials. In fact, 66% of students skip buying at least one textbook every semester while in college.[14] However, faculty are increasingly identifying ways to help learn that doesn't require spending hundreds of dollars on textbooks.

This book is an example of an **open educational resource** (OER), and more specifically, an **open textbook**. When faculty assign open textbooks, students have access to them on the first day of class, and faculty can customize material to support their curriculum. Instead of assigning a textbook that costs $200 and only using 30–50% of the contents, professors can ensure that the assigned materials support their preferred teaching strategies so that students have the best learning experience.

Other **open education practices** extend beyond just textbooks and can also include **open pedagogy**, where students take part in creating learning materials for an external audience. In courses where faculty and students create new resources together, students may be asked to participate in making decisions about everything from the platform used to distribute resources to the licensing terms applied to them.

Many musician-scholars include some kind of teaching in their career plans. Knowing about OERs can

14. Cailyn Nagle and Kaitlyn Vitez, "Fixing-the-Broken-Textbook-Market," June 2020. https://pirg.org/wp-content/uploads/2022/07/Fixing-the-Broken-Textbook-Market_June-2020_v2-5.pdf.

help you make decisions about what to use in your own curriculum and guide how you might develop resources to share. Many colleges and universities will even incentivize the development of OERs by providing faculty with stipends or grants to fund their creation.

The complex licensing scheme that allows Spotify or YouTube to legally share large catalogs of music for free can seem like a kind of open access. But in OER publishing models, the goal is to compensate an author or creator at the beginning of a project so that no licenses or **royalties** need to be collected after the work is published. These works are also generally released with an **open license** such as **Creative Commons**, that promotes resharing, remixing, and reusing without needing permission from the **copyright holder**.

While freemium streaming models provide free access, they are not true open publishing platforms. Open publishing is starting to take shape in some musician-scholar communities for noncommercial research-creation projects. Projects like *Handel for All* and *All of Bach* aim to make video performances of the composers' full catalogs available in high-quality versions online. *The Public Domain Song Anthology* presents over 300 standards from the *Great American Songbook* in Real Book style with traditional and modern harmonization. More research-focused resources developed for scholars, such as the *Neue Mozart-Ausgabe: Digitized Version*, are also becoming more commonly available online for researchers.

These open projects are attracting musician-scholars who want to change the systems of compensation for their work while making it easier for audiences to experience and use their work in other research-creation projects.

Research After Graduation

After graduation, many students are stunned at the number of **paywalls** they run into when trying to do basic research. Everything from a new analysis of a Chopin nocturne to new medical breakthroughs may be more difficult to read without paying a fee. Some people find themselves relying on **pirate sites** like Sci Hub[15] and LibraryGenesis.[16] However, there are resources you can use as an independent musician-scholar to unlock **scholarly publications** legally to continue to incorporate scholarly research in your research-creation projects.

Your Library

You may think of your local library as the place you went to borrow picture books as a child. Aside from children's books you can often find research databases, language learning systems, and wealth of research material for reference. These resources can be especially useful for locally focused research-creation projects to better understand your community. Your local library will also offer **interlibrary**

15. Press Release, "Electronic Frontier Foundation to Present Annual EFF Awards to Alexandra Asanovna Elbakyan, Library Freedom Project, and Signal Foundation," Electronic Frontier Foundation, July 26, 2023, https://www.eff.org/press/releases/electronic-frontier-foundation-present-annual-eff-awards-alexandra-asanovna-elbakyan.
16. Blake Brittain and Blake Brittain, "Textbook Publishers Sue 'shadow Library' Library Genesis over Pirated Books," Reuters, September 14, 2023, sec. Litigation, https://www.reuters.com/legal/litigation/textbook-publishers-sue-shadow-library-library-genesis-over-pirated-books-2023-09-14/.

loan services that will borrow materials from other libraries on your behalf so that you can access important research that you need.

You may also have access to some **research databases** as an alumnus from your college or university. Make sure to check with your alumni office to find out.

Browser Extensions

Here are two important resources you can add to your browser to find the version of an article stuck behind a **paywall.** First, you can try the Open Access Button, which will try to find an open access version of a paywalled article. If it can't find it, the Open Access Button will contact the authors and ask them to make it openly available for researchers like you. Next, you might try Unpaywall, a database of nearly 50 million **open-access** versions of scholarly articles. The **browser extension** shows you a green unlock button when there is an open-access version of an article you want.

As we mentioned in Chapter 5: Practical Search Strategies, Zotero is a useful tool for managing your own collection of research resources. You can use the Zotero browser extension to add resources to your Zotero library where you can organize, annotate, and generate bibliographies.

In addition to these two tools, musician-scholars often find themselves looking for information from websites. Sometimes those websites might be taken down, moved, or changed over time. If you ever find yourself needing to uncover what a website looked like on a specific date or period of time, the Internet Archive's Wayback Machine opens a window into the internet's past.

Open Education Repositories

Many **open educational resources** are housed in **repositories** at colleges and universities or on publishing platforms like Pressbooks (where this book is hosted!). You might also find OERs on Worldcat.org, the **library catalog**. However, sometimes you want to search specifically for **OERs** and aren't sure which resources you can trust.

George Mason's OER Metafinder searches across popular **OER** collections including OER Commons, OASIS, MERLOT, and OpenStax. These collections offer resources at the K-12 and college level materials. OASIS includes not just OER, but other open access books from **scholarly publishers** in 115 different collections.

Books

Sometimes you just need an old-fashioned book to help you with your research. If the book you want isn't published as open access, there are still some options to get what you need.

Google Books searches the full text of millions of books and provides access to short snippets. Sometimes when you only need to verify a fact or cite some very specific evidence, Google Books is enough. And don't forget to scroll down on the "Get the Book" section—if you need the full text, it can tell you the nearest library that has the book.

Collections of open access books are also growing. The Directory of Open Access Books (DOAB) provides access to more than 78,000 open access books in every discipline. Books hosted on their

OAPEN platform include useful annotation tools that can help your analysis and summary work. University Presses are also making more information openly accessible. Project MUSE, an initiative of the Johns Hopkins University, hosts open access books and scholarly journals. MIT Press and the University of Michigan Press also support robust open access book programs. However, finding individual open access books can be challenging; projects like the DOAB attempt make that easier by creating a catalog where you can search these offerings in one place.

The Internet Archive's Open Library can provide access to electronic versions of physical books that were never published as e-books. It also can help you find books it doesn't have in full text through Worldcat.org so that you can get them at the library closest to you. Additionally, the Internet Archive and the HathiTrust Digital Library provide access for those with visual impairments who may need **adaptive technology** to access books that are not available online from the publishers. The Internet Archive also host a number of music collections including the Great 78 project, Live Music Archive, the Free Music Archive of musician contributed audio, and the DATPIFF Hip-Hop mixtape archives.

While it might seem hard to believe there could be an information desert in 2023, for musician-scholars who are struggling to find materials without access to a large research library, it can be a frustrating experience. The tools mentioned above provide free and legal access to important research and teaching collections that you can use long after your university library card expires. And remember, if you live near a college or university, you may also be able to go there in person to use the collections, even if you can't access them from your couch.

Breaking Down Your Research Topic

While Luis and Hyo-Eun were researching history and finding primary sources, they ran into some challenges. Some of the books they wanted to consult were at other libraries and they weren't sure if it would be worthwhile to request them through interlibrary loan. What if the books came and weren't useful?

Luis and Hyo-Eun soon learned that previews in Google Books and the Open Library let them examine these books to decide whether to request them for further research. This step saved them time in their research process.

In addition, they found recordings they wanted to study, but were at inaccessible archives outside of Baltimore. Juliano suggested looking at the Great 78 project. They were excited to find early recordings of some of the project's folk songs. The Great 78 Project's online collection of early 78 rpm disks offered ideas and insight into how these folk songs were performed and shared in the early 20th century.

Conclusion

This chapter covers the dynamic and ever-changing publishing landscape of the digital age. From traditional print media to today's digital landscape, musician-scholars face a myriad of challenges and opportunities in their research process. The transition to digital knowledge production has not only reshaped how knowledge is disseminated but also how it is accessed.

Our next focus will be on the critical task of successfully publishing your creative work. This requires a keen understanding of legal issues, ethical considerations, and publishing practices. This requires a keen understanding of the legal issues, ethical considerations, and publishing practices. In the next chapter, we begin to understand how the foundational knowledge we've explored can be applied in producing and sharing your research-creation projects.

Key Takeaways

The long history of publishing scholarship in music and other disciplines extends back 1,000 years and covers formats from oral traditions to print materials to digital environments. Understanding this history aids in navigating online and and physical research environments.

Support open access initiatives to promote free and widespread availability of scholarly work. This can involve contributing to institutional repositories or supporting initiatives that make scholarly work freely accessible.

Utilize and contribute to open educational resources(OER) to enhance learning and teaching experiences. This includes adopting open textbooks and participating in open pedagogy projects.

Anticipate the challenges of accessing scholarly materials as an independent researcher. Familiarize yourself with tools such as browser extensions, open education repositories, and alternative sources including Google Books and the Internet Archive for continued access to research materials.

Media Attributions

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11

MANAGING YOUR CREATIVE WORKS

Kathleen DeLaurenti

Understanding publishing systems and identifying stakeholders helps us improve our search strategies and understand the relationships among creators, copyright, and publishers. The next step is to use this information to successfully plan a **research-creation** project that accounts for these issues so that you can make sound legal and ethical decisions about distributing or performing your research-creation projects.

In the Part II: Copyright Essentials, we explored the legal considerations required to manage copyrights when performing, displaying, and teaching works created by others. This chapter shifts focus to your

rights as a creator. We examine how your personal values and **artistic mission** shape the ways you can make your work accessible. We aim to deepen your understanding of your own rights and how they can align with your creative goals and dissemination strategies.

As we know, scholars in other disciplines who focus on sharing their work in text-based formats increasingly value **open access** to expand the reach of their work. As a **musician-scholar**, you may engage in that system of scholarly publishing at some point in your career, and your strategies for disseminating that work may align well with standard open access principles. You may use different approaches, though, when considering how to publish and share research-creation projects that are embodied in other media like live performance, installations, sound recordings, or film. Modern distribution of a musician-scholar's work often includes strategies for **freemium** or **premium streaming models** that can be easy to use, such as SoundCloud, or seem impossible to distribute with, like Netflix.

Before you make decisions that can have long-term impact on your work, it's important to understand the implications and options available to you.

Centering Your Artistic Mission

Musician-scholars sometimes feel like maximizing income is the only issue when making decisions about disseminating work. Conflating managing your copyrights with making money can lead to situations where copyrights are transferred for the promise of maximizing income. These transfers can sometimes have a negative impact on your decision-making power in the future. Just as the Copyright Act aims to create a system that balances the interest of **copyright holders** and users, when you create work, you should balance your economic interests with your **artistic mission**.[1]

To do this, you will need to define your **artistic mission**. It is common to define your mission as a series of questions:[2]

1. How do artists you admire communicate consistency and authenticity?
2. Who is your audience?
3. Ask yourself what, why, and so what?

Answer to these questions can help you communicate your values to funders when developing your mission around a project or seeking a new direction for your work. Answering these questions for yourself also provides you with solid values to lean into when thinking about how to disseminate your work.

In a world before streaming and the internet, technology limited the avenues where multimedia work could be accessed. Now, significant amounts of media are available to anyone with access to the internet. This has had profound impact on the economies of sharing and accessing music and multimedia. This near-universal access also provides you with unprecedented control over building your plans for sustainability and determining what role disseminating your work plays in your career.

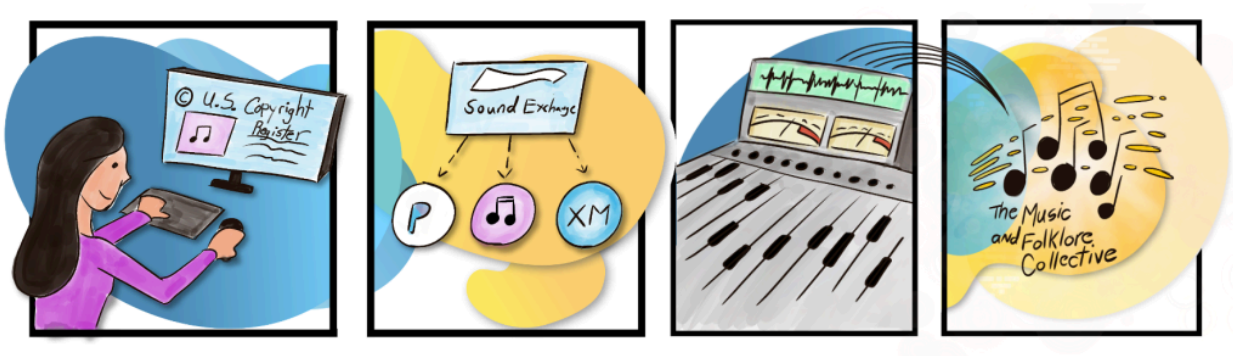
1. Rebecca Giblin and Cory Doctorow, *Chokepoint Capitalism* (Beacon Press, 2022) https://www.google.com/books/edition/Chokepoint_Capitalism/CzuAEAAAQBAJ?hl=en.
2. Adapted from Zane Forshee, Christina Manceor, and Robin McGinness, *The Path to Funding: The Artist's Guide to Building Your Audience, Generating Income, and Realizing Career Sustainability* (The Peabody Institute of The Johns Hopkins University, 2022), https://pressbooks.pub/pathtofunding/. Available under a CC-BY-4.0 license.

In the past, artists sought backing from record labels to invest significant financial resources into recording, duplicating, marketing, and distributing an album. Sales were needed to recoup those investments before artists were paid.[3] This system traditionally asks artists to transfer copyrights to record labels and publishers, providing them with management services in exchange for control over their exclusive rights.

Today, you can record, master, and distribute a professionally produced sound recording with minimal personal investments. While funding artistic ventures can be challenging, new technology provides more opportunities to directly engage with your audience. Artists are leveraging crowdfunding sites like Patreon, IndieGoGo, or Kickstarter to build relationships with their audiences and change existing economic models. Instead of streaming, sales, and licenses recouping the costs of recording and releasing an album, artists can raise funds for recording equipment, studio time, and labor before a record is even released.

Like new **OER** models where institutions and funders compensate scholars when their work is first made instead of waiting for **royalties** after publication, these tools allow musician-scholars to retain control over their artistic work and career sustainability. Once you have a defined mission, you can build your approach to rights management and dissemination as one part—but not the only part—of your sustainable career.

Breaking Down Your Research Topic



Hyo-Eun has suggested recording the songs they are arranging to share on their website and to post to streaming services.

She knows that there aren't any copyright permissions they need to use the music, but she also knows they need to make some decisions about who will make long term decisions about the recordings, what happens with any royalties they collect, and what terms they might want to apply to the use of the recordings.

Hyo-Eun starts researching the services they plan to use to make the recordings available. She wants to understand their requirements and how they align with the copyright issues for this research-creation project. They'd like to host the audio on SoundCloud to embed in their site and release it to major streaming platforms such as Spotify and Apple Music.

3. Albini, S. "The Problem with Music," The Baffler, September 30, 2012, https://thebaffler.com/salvos/the-problem-with-music.

Know Which Rights You Are Working With

When you start any project, it is critical to identify which rights you will need to manage throughout the project. It is important to develop a structured way to understand which scenarios might apply to your research creation project. A **rights inventory** that helps you track and understand all the copyrights in your project can be an incredibly useful tool.

The authors often work with students who start with a project idea and then hope to figure out the rights later—when it could be too late. Early in your career, especially when collaborating with colleagues, it can be uncomfortable to make formal agreements about your artistic work. However, just like communication is the cornerstone of all relationships, explicitly understanding and communicating rights and responsibilities from day one will lead to a healthy collaboration in managing your copyrights.

Creating Original Works

When you are creating original work, below are some of the questions you want to ask.

Are you a joint copyright holder with another creator?

Filing to register your copyright with the U.S. Copyright Office is a good way to ensure you and your collaborated agree on their creative role while also ensuring you secure the exclusive rights you need to defend your copyright from infringement claims. You can register sound recordings or musical works with multiple copyright owners.

Which copyrights will you need to manage before publication?

This could include a score, a sound recording, or a live performance video. It is important to know who the copyright owner will be for each component of your live performance or recording project.

Does your project include any works where you are not the copyright holder?

Do you need to license text, music, images, or other copyrighted works as part of the performance or recording project?

Are those copyrights owned and managed by third parties?

This could include text you want to set or music you want to **sample** or **interpolate**. Sometimes, the creator of a text or musical work is not the copyright owner. It's important to identify and contact the copyright owner when you need to license a copyrighted work.

Are any of these works in the public domain?

You can always freely incorporate public domain works into your live performance or recording project without securing any copyright permissions.

Copyright Resource

The Cornell University provides the Copyright Term and the Public Domain chart to help your research. It is licensed under a Creative Commons Attribution 4.0 International License.

Using Copyrighted Works of Other Creators

When creating a performance project that includes the copyrighted works of other creators, you may ask slightly different questions.

Are you performing solo or alone?

When you perform with collaborators, decide if you will share copyright in any recorded versions of the performance.

Are the works you plan to perform copyrighted or in the public domain?

If they're in the **public domain**, you don't need any additional licenses for performing publicly, livestreaming, or making recordings in any format available.

Are you planning to perform live or are you also streaming, recording, or making a recording of the performance live after it occurs?

If you are performing live, investigate whether you need a **public performance**or if the venue has one already. Find out if you need additional licenses for streaming or making recordings available on demand.

Is any recording you want to make available going to be audio only or audio/visual?

Audio recordings of copyrighted work posted to many streaming platforms will be covered by the platform licenses.[4]

Who is making the recording?

Find out who is recording the performance. Determine who owns the copyright of any audio or audiovisual recordings of the performance. The copyright might be owned by the recording engineer or venue, or qualifies as work for hire because you hired someone to make a recording.

Rights Inventory

A **rights inventory** determines which copyrights are involved, who owns them, and what kind of permissions you will need to complete your research-creation project. Making this inventory will

4. Notably, at the time of publication, Bandcamp does not have any public performance or mechanical licenses in place and if you want to release music on that platform, you will need the rights necessary to stream and sell your digital downloads or physical copies on Bandcamp.

also help you understand what rights may need to be managed for the duration of your new work's copyright. This is important to know, as any copyrighted work you produce will be copyrighted for 70 years after your death. Here is an example of what a **rights inventory** might look like for a research-creation project.

Table 11-1. Folktale Project Rights Inventory

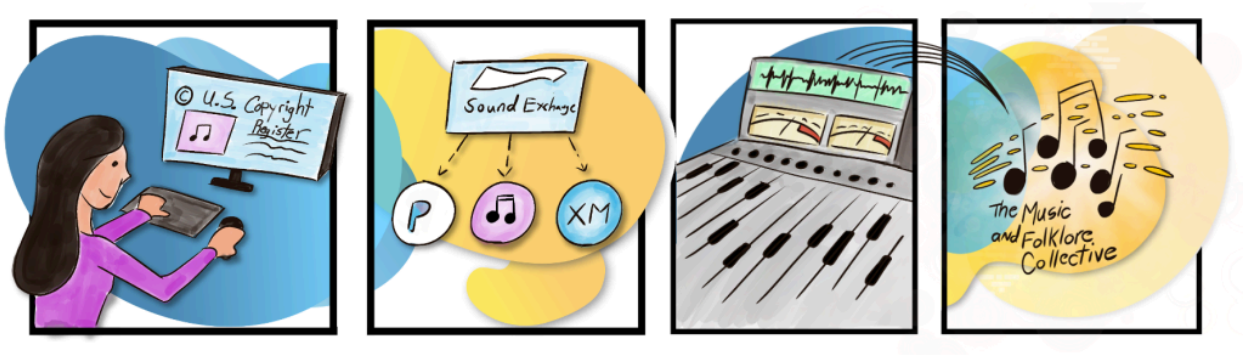
Work Title	Creator	Copyright Owner	License Required	Additional Concerns
Arirang	Unknown (folksong)	Public Domain (estimated 600 years old)	None	Used as a resistance anthem during Japanese occupation; research the song to determine suitability
Arirang (recorded by our group)	Luis as recording engineer; All group members as performers	All group members	None	Include in rights management plan
Translation of text	Hyo Eun	Hyo Eun	None	Include in rights management plan

Create a Rights Management Plan

Once you have inventoried the copyrights involved in your research-creation project, you will need a plan for managing any rights that you and your collaborators control. This may involve making some decisions about how any research-creation outputs that have new copyrights will be published or shared. A **copyright management plan** outlines which rights are involved, who will manage them, and how these rights align with your **artistic mission**.

When you plan what rights you might need to license, which new copyrights are being created, and who will own them, you can also identify what kinds of financial resources you will need to secure and manage permissions. Tying this to your artistic mission helps you make a case to funders that can help you develop sustainable alternatives for your career that do not rely primarily on complex royalty systems.

Breaking Down Your Research Topic



Sebastian and the other musician-scholars know that they want their research-creation project to be something that other musician-scholars can apply to additional cultural contexts.

They decide that they do want to collect royalties from their streaming sound recordings, so the group decides not to assign **creative commons licenses** to the musical arrangements or the sound recordings. The do decide to register the arrangements with the U.S. Copyright Office and with the composers' PROs. They will post the arrangements for free online; they know that the public performance licensing system won't collect much in royalties, but they do want to re-invest any royalties back into maintaining the website or other hosting costs.

However, they do want other musician-scholars to be able to adapt their translations and use the images that their friend Gil was hired to make. They hope other musician-scholars will be inspired to add additional content to this project representing cultures that they weren't able to include in this project. To do this, they decided to ask their illustrator to apply a creative commons license to their illustrations so that they can be reused and adapted for other cultural contexts in appropriate ways.

This kind of mission-driven decision making can be compelling to funders and could help Sebastian and their colleagues make a case for in their grant budget for funding that not only compensates Gil's initial contribution, but also feels appropriate to compensate them for future uses.

Table 11-2. Folktale Project Copyright Management

Work Title	Creator	Copyright Owner	Publication Rights	License Terms	Artistic Mission	Royalty Distribution
Arirang English Translation	Hyo Eun	Hyo Eun	Release into Public Domain	CC.0 – public domain	Maximize access for use in educational materials; include in funding request	
Arirang illustration	Mary	Mary	Release with creative commons license	CC-BY-NC: noncommercial reuse allowed	Maximize ability for reuse and publication in additional educational formats	
Arirang recording	All group members	All group members	Release © through a sound recording aggregator/ SoundCloud	©	Allows us to maximize the platforms where our work is shared; generates passive income	Create an agreement where one group member manages royalties, and they are reinvested in supporting our website and surplus revenue is distributed equally after thresholds are met

Understanding Creative Commons

Introduced in Chapter 10: Publishing and Accessing Information, **creative commons licenses** allow a **copyright holder** to share their work with audiences and other creators without requiring a request for permission. You can apply creative commons licenses to any distinct copyrighted work. That means that when you create your copyright management plan, you can choose to release some components of your research-creation project under traditional publishing.

There are some significant aspects of creative commons that are important to consider when using these licenses. Creative commons licenses **always** require attribution to the creator of the original work. You can observe this in action in Chapter 4: Preparing to Search which was, in part, adapted from another OER. There are also images throughout this book that were used or adapted under creative commons licenses.

Creative commons licenses do not change the copyright status of the work. They simply allow copyright holders to grant some permissions related to exclusive rights. Any exclusive rights that are not detailed in the license are still controlled by the copyright holder. For example, the most restrictive creative commons license, the CC BY-NC-ND license simply allows anyone to share a copyrighted work. It does not allow commercial use or modifications of the licensed work.

Creative commons licenses cannot be changed once you've used them! The licenses rely on users resharing without permission from the copyright holder. If a license could be changed, there could be multiple versions of the same copyrighted work with different licenses resulting in a crazy-quilt of different permissions. To summarize, any creative commons license applied to a work lasts for the duration of any copyright protection.

There are some specific issues relating to music and creative commons licenses. These licenses generally require you to forfeit royalties for compulsory licenses generated from downstream uses. That means that if you release a musical work under a CC BY-4.0 license, you may not be able to collect royalties from recordings that others have made of—or derived from—your musical work.[5]

Generally, creative commons licenses may make the most sense in your distribution strategy for works where you are compensated in advance or in situations where you often aren't compensated at all, such as traditional scholarly publications. In these instances, you may have less concerns about potential income from uses covered by a creative commons license and you can more easily choose license options that optimize sharing.

Our hope for this book is that learners and educators will translate, adapt, and reuse it broadly.

Music Publishing

Music publishing can seem even more opaque than publishing your written work with a scholarly publisher. Unlike scholarly publishers, music publishers often do not make the terms of publishing agreements publicly available. Even **performing rights organizations** do not have specific, transparent terms explaining how public performance royalties are determined and what rates you can expect to be paid. It can be confusing to know how to get started and what a good publishing agreement will look like for you.

Understanding copyright and publishing basics is important, whether you are accessing copyrighted materials or publishing your own work. In this section, we'll focus on navigating publication of your musical work. As Sarah Osborn notes, publishing and copyright are linked.[6] Given that copyrights related to publishing can be a source of income, it is important to examine this relationship.

Understanding these income-related concerns also helps to determine what alternative funding you might pursue for projects where you want mission-driven alternatives to traditional publishing. When deciding how to release this textbook, the authors spoke with colleagues who had published traditional textbooks to better understand what their experience with royalties was. We found that the publishing contract for our open education book is on par with two to three years of royalties for some traditional textbooks. Because of changes in technology and the law, it's reasonable to assume that this book will likely need revisions in two to three years to remain useful for readers. Given those facts and our desire to make this information more accessible to musician-scholars, publishing it as an open textbook made sense from both economic and mission-driven perspectives.

Publishing Musical Works

Congratulations! After completing your first research-creation masterpiece in the form of a new composition, you are eager to get it out into the world, but where do you start? How do you get your work published?

5. "CC BY 4.0 Legal Code | Attribution 4.0 International | Creative Commons," accessed February 20, 2024, https://creativecommons.org/licenses/by/4.0/legalcode.en.
6. Chris Dromey and Julia Haferkorn, The Classical Music Industry (Milton, United Kingdom: Taylor & Francis Group, 2018), https://worldcat.org/title/1031314250.

Of course, you hope the music publishing industry will hear your work and immediately offer you a contract. However, in a competitive music world, highly regarded publishers such as Boosey & Hawkes do not accept unsolicited submissions from composers.[7]

However, you will still need to understand how basic, traditional publishing agreements work. Generally, when you sign with a publisher, you assign the copyright in your music to the publisher. They will use their marketing, public relations, and legal teams to have your music performed and licensed to generate royalties. In addition to transferring your copyright to them, the publisher will generally claim 50% of all **royalty** income from licensing, sales, and rentals of your work. The main ways publishers work to generate those funds are:

- Rental of performance scores for orchestral or large dramatic works
- Licensing of public performances
- Licensing of grand rights for dramatic works
- Mechanical licensing from works recorded for CD or streaming distribution
- Licensing music in television, film, and other audiovisual works
- Sales of musical scores (in print and/or digital)
- Permissions for excerpts, arrangements, sampling, or other uses[8]

Plainly, publishers invest significant resources into generating revenue from the composers in their catalog. While this can be beneficial, it's important to understand what this means for you as the composer. A publisher in control of your copyright can make all the decisions about how your music is used. You may want a podcast to feature your music or for your friend to livestream a performance, but the publisher is now the only entity that can grant those permissions. And in some situations, the publisher's decision might not align with your **artistic mission**.

During the COVID-19 pandemic, this became an issue for many composers and performers. We saw musicians trying to come together to find ways to create music and community online. But because permissions and contracts were still required from publishers in many circumstances–especially for posting streaming performances on platforms like YouTube or Vimeo–composers sometimes saw these performances silenced or removed from the platforms all together. Publishers were not always equipped to respond to performer needs and couldn't come to an agreement in a timely manner. In other situations, composers wanted to give their friends permission to perform their works, but discovered that they had transferred that right to their publisher.

What are the options for a composer who wants to spend more time composing than managing a publishing business? Some traditional publishers will offer an agency deal, where they administer some of your publication rights and you continue to own your copyright. There are also companies like Bill Holab Music that offer a suite of services for composers invited to work with them.[9] Their model provides many of the services of a traditional publisher, but leaves composers in control of—and responsible for—managing their copyrights.

Self-publishing through a sheet music platform or through your own website is also an increasingly

7. "Boosey & Hawkes: The Home of Contemporary Music," accessed November 27, 2023, https://www.boosey.com/aboutus/help/.
8. Marc D Ostrow, "How Composers Earn Money from Their Compositions," n.d.
9. "About Us - Bill Holab Music," Bill Holab Music, accessed November 7, 2023, https://billholabmusic.com/about-us/.

popular option. If you decide to use a platform like SheetMusicPlus, Theodore Presser, or ArtistShare it is important to be aware of their terms and conditions for selling your music.

The first thing to understand about digital scores is that they don't function under first sale the same way that a print score does. That means that if someone buys a digital score, they can't resell, lend, or share that score without additional permissions. For example, when you buy a print edition of a string quartet, the publisher generally sells the parts as a set. When the score arrives, the parts can be distributed to each member of the string quartet. If you purchased the same set of parts digitally, under the licensing terms for some online score distributors, you must buy a set for each member of the quartet. Understanding how the online platform works is important to meet the expectations of your consumers. Many musicians wouldn't expect to buy four sets of digital parts just because they are digital and not print scores. Generally, you will license digital content, not sell it, which makes the details in those licenses important.

A few things to explore when deciding on using a **self-publishing platform** versus setting up your own store on your website:

- What terms does the platform allow you to customize for buyers?
- Can you provide specific terms around lending, reselling, etc.?
- What percentage of your sales prices are you comfortable sharing with a publishing platform?
- Does the platform use digital rights management software that limits who can access a digitally licensed score?
- Can your scores only be used on the device where they were downloaded? Through a specific app?
- Does the platform provide terms that allow libraries or other cultural heritage institutions that archive and lend musical scores to add it to their collection?
- What happens if you post scores online without any of these terms? Aren't all kinds of information posted online to be used?

Some composers, like Pulitzer Prize-winner Raven Chacon, post their scores for free on websites of musicians who commissioned their work or on their own websites. Can't you just use those scores?

The reality is that the use of those scores is still very limited. If they're available with a prominent download option, then you can safely assume that the person hosting those files allows you to download them. However, you may still need additional licenses to do anything with them, including perform them. Because copyright is automatic in the United States, anything posted on a website is copyrighted, and the copyright holder fully controls the rights to use them unless they provide explicit license terms about how it can be used.

The Music Library Association(MLA) has endorsed a helpful model purchase and licensing agreement that you can use if you want to make your work available to libraries.[10]Models like this can help you understand how you work will be used in the library. It allows you to adapt the agreement so that when your compositions are added to a library collection, you won't need to engage in negotiations with every library that wants to add it to their collection.

10. "A Model for Purchase and Licensing of Digital Scores – MLA News," accessed November 27, 2023, https://wp.musiclibraryassoc.org/a-model-for-purchase-and-licensing-of-digital-scores/.

This model is a purchase and license agreement so that it is clear to both parties that you are selling a PDF file and also granting some permissions for its use. These permissions are clearly articulated so that you know what permissions you are providing. In the model, these permissions align with practices that users expect from library print collections. They want to download or print them for analysis and mark-up, place them in course reserves for study, share them through inter-library loan, and use technology to preserve them for the future. You will see that public performance is not included in the MLA model. Performers still need to secure any licenses required to record, perform, or distribute performances of compositions added to library collections under these terms (just like they would with print scores!), and you will receive appropriate royalties for any of those activities.

Without such models, libraries are finding that many composers are unsure about how to negotiate licensing terms to sell and license digital scores for library collections. At Peabody's Arthur Friedheim Library, many of the composers who we approach about adding their digital scores to our library never respond at all. Independent composers who contribute their work to libraries may see advantages from making their work accessible. Scores sold to libraries can lead to public performances and recordings that can raise a composer's profile and generate income from additional licensed uses.

Publishing Sound Recordings

Publishing sound recordings of your research-creation projects is easier today than ever before. It can seem daunting to understand how to move forward with making your recordings available while continuing to have a sustainable career. However, high-quality recordings are still an important way for potential clients to hear your performances, no matter how they access them. Understanding some basics about releasing sound recordings prepares you to take advantage of the do-it-yourself resources now available.

First, it's important to understand who owns the copyright in sound recordings. When producers, engineers, and performers enter a recording studio, the law does not determine who owns the copyright.[11] This is determined through contractual agreements. It is also important to remember that the copyright for a sound recording resides in the creative capture of an audio performance and does not include the copyright to any of the musical works being recorded.

The most common traditional agreement between a performer and a record label is one where the label invests in all the costs associated with making, marketing, and managing a recording. In exchange, performers transfer any copyrights they might have in the recording to the record label. Sometimes, a contract will outline any performances of the recordings as **works for hire**; in this case performers do not have any copyright ownership in the recordings.

Generally, performers will receive sound recording royalties based on contracts. If the performers are also the composers of the works on the recording, they will receive separate royalties from a PRO for the musical works. This can be confusing, so let's look at an example.

You compose a song cycle and record it with a singer. You agree that you will retain the copyright to the recording and the musical work. For the sound recording you receive the following:

11. "Author(s) of the Sound Recordings | U.S. Copyright Office," accessed November 27, 2023, https://www.copyright.gov/eco/gram-sr/author.html.

- Digital performance royalties from digital audio transmissions
- Master royalties from streams on streaming platforms or use in sampling, television, film, or other audiovisual works
- Reproduction royalties from sales of physical recordings or digital downloads

For the composition fixed in the recording, you receive the following:

- Public performance royalties from all public performances (live and online)
- Mechanical royalties from streams, digital downloads, and physical sales (and from subsequent recordings made by other artists)
- Synchronization royalties from use of the musical work in television, film, or other audiovisual works
- Other licenses, like interpolations or arrangements

The singer you collaborate with would receive a contractually agreed on percentage of sound recording royalties and no royalties from the musical work. Performers also get a **statutory** royalty for digital audio transmissions of sound recordings—think SiriusXM or Pandora—but all other royalties generally come from the party managing the sound recording. In this example, it might be you. It could also be the record label or a rights management company that manages all of the copyrights for a fee.

Historically, record labels worked on a cost recovery basis: Artists were paid an advance to cover all aspects of recording, marketing, and distributing a recording but did not receive royalties until those costs had been recovered by the record label. Today however, most classical music labels require performers to pay for the recording, duplicating, and marketing costs of a new recording.[12]

If you decide to release your work independently, you may want to understand how royalties will be paid. With so much confusion about royalties and streaming, it can be hard to make sound decisions about how to release a recording. How royalties will be distributed on a project can also be complex, depending on how you structure your business and contractual relationships with your collaborators.

In 2016, a breakdown of streaming on Spotify showed that for every $1 earned, a major label artist earned $0.1814, an independent label artist earned $0.3999, and self-released artists earned $0.6418 on Spotify.[13] These figures reveal the cost of having a label release your music. But self-released music pays you back for the labor you invest.

If you're recording a musical work copyrighted by someone else, you may need to factor in a mechanical licensing fee for distributing a recording of that work. As we learned, with the launch of the Mechanical Licensing Collective, you generally do not need to file a Notice of Intent with the U.S. Copyright Office or pay mechanical licensing fees for digital-only releases.[14] However, if you are releasing your recording

12. Jeffrey Arlo Brown, "Big Breaks," VAN Magazine, November 12, 2020, http://van-magazine.com/mag/orpheus-classical/.
13. "How Does Music Streaming Generate Money?," Manatt, accessed November 27, 2023, https://manatt.com/insights/news/2016/how-does-music-streaming-generate-money.
14. "Section 115 - Notice of Intention to Obtain a Compulsory License | U.S. Copyright Office," accessed November 27, 2023, https://www.copyright.gov/licensing/sec_115.html.

through Bandcamp,[15] physical CDs, or vinyl you still need to follow the notice and licensing procedure and pay a mechanical license as outlined by the U.S. Copyright Office.[16]

There are pros and cons to self-publishing your music and sound recordings. It is important to think not only about the project you are working on today but also how you want to use it in the future and which copyrights you think will be important to retain. Your publishing choices impact the ways your audience can access your music. But they can also impact how you can use your own music in the future, so these decisions are a critical part of sharing your work.

Conclusion

In this chapter we uncover key publishing strategies and considerations essential for musician-scholars. We take a comprehensive look at how to balance the protection of your creative rights with the desire to share and publish work in an increasingly digital world. We also explore the legal frameworks and ethical dilemmas that shape the way creative content is controlled and disseminated. These insights are not just theoretical constructs but also vital tools for navigating the real-world challenges faced by musician-scholars. These lessons form a critical foundation for anyone seeking to make informed decisions about their creative output in a landscape that is as legally complex as it is artistically rich.

Key Takeaways

Define your artistic mission and values to guide decisions about disseminating your work. This alignment ensures that your economic interests and artistic goals complement each other.

At the start of any project, use a rights inventory to identify all copyrights that are implicated in the scope of your work. Knowing the copyright status of every copyright in your project helps you create an effective copyright management plan.

Create a copyright management plan to understand near and long-term copyright management for your research-creation projects. This includes logging decisions on publication and sharing of your work. This plan should align with your artistic mission and consider financial resources needed.

Learn about Creative Commons licenses to share your work broadly without requiring permission for each use. This knowledge allows for strategic decisions in your copyright management plan.

When you consider self-publishing on platforms or your website, understand any terms regarding digital rights management, first sale, and consumer expectations.

Make decisions not just for current projects, but also consider how you want to use your work in the future. Your publishing choices affect both audience access and your future usage rights.

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15. As of this writing, Bandcamp is not a licensee with the Mechanical Licensing Collective.
16. "Section 115 - Notice of Intention to Obtain a Compulsory License | U.S. Copyright Office."

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12

PUBLISHING: AN EXPERT PANEL

Kathleen DeLaurenti

In this chapter, we bring together insights from seven accomplished **musician-scholars** , each engaged in various facets of publishing. These experts are aware of their diverse audiences and tailor their dissemination strategies accordingly. Here, they delve into their unique approaches to sharing their work, emphasizing the importance of aligning these dissemination practices with their personal missions and values. Their insights offer a nuanced understanding of the challenges and opportunities in the contemporary landscape of publishing.

Our expert musician-scholars are engaged in publishing in a variety of ways. Some of that is very informal and one-to-one sharing of expertise.

> "One of the challenges of working as a teaching artist is that each situation is so unique. The partner's needs are different, the budget is different, the scope of the work is different. Every project has its own parameters. When it comes to disseminating the work, much of my work in arts integration is designed to help teachers do what I do. I leave behind strategies, I leave behind lesson plans, I leave behind experiences with the hopes that those teachers will continue to try to write songs with their kids or bring out the drums in their classroom or whatever it is that I've modeled and worked with them on. There is an intentional dissemination of teaching strategies and effective lesson plans with the teachers I work with. That sort of informal dissemination is built into that teaching artist." **Christina Farrell**

> "Over the last couple years, I've tried to approach my art making from a point of view of 'I want to choose making things that I think are good art and not choose things that are paying me money.' Within that context, the proof of sharing can come out in the performance. I don't think that it has to be a scholarly document that comes along with it." **Robin McGinness**

They also consider the audience for their different works when they are considering how to publish it with a broader audience.

> "There are a lot of audiences for teaching artists: artists, funders, schools, arts organizations. In trying to further the field of teaching artistry and help people understand the value of this work, I'm often trying to think of how to reach all these different groups of people. Occasionally, there are opportunities to present at conferences or opportunities to do professional development. A big part of my dissemination is speaking and demonstrating the work. For me, doing the work is better than publishing the work. The most impactful way to disseminate the work is by doing and showing and sharing. I do a lot of in-person workshops to demonstrate the kind of work that I do." **Christina Farrell**

> "I also think about audience, right? I want a particular piece to reach musicologists, ethnomusicologists, or beyond the field. Am I talking to hip hop scholars or popular music scholars? I am talking to scholars in American studies? I think about what I want the conversation to be, and in terms of which journals or which conferences I want to participate in. I also think about public access. Those things are very much related but may be done through different modes. Unfortunately, a lot of institutions don't value public work as much as they do the peer-reviewed work. But the public work is super important to me because I want more than just five people to read the thing that I'm working on. But I also think that I have something to share with the more general audience that can help shift some of the narratives that are happening in the mainstream or popular discourse. I will do things like *ABC News* or *USA Today* that might reach a broader audience. It really depends on the realities of the job versus the venue versus the conversation I'm trying to be in the moment." **Lauron Kehrer**

> "I would say I haven't enjoyed any of my academic publishing processes. But I will say sometimes, the call for proposals is too good, too precise for me to resist contributing. That's where I've decided to do it, where it's like the *American Indian Culture and Research Journal* is doing an 'extraterrestrials call' for proposal. I can't say no. Same with MIT's Media Lab resisting reduction with artificial intelligence. We could not say no—it was for us. I couldn't say no to those things. There are some journals that I haven't published in that I would like to. The way I'm choosing them is based on the editor, the guest editors, and my relationship to them or my confidence in their previous work. That's probably the best way to do it, though I still think traditional publication is extremely difficult and inaccessible to most people." **Suzanne Kite**

When talking the differences between her book publication[1] and website on music theory examples,[2] Paula Maust shared these reflections.

> "I was most concerned about making sure that the materials that I've created have the broadest possible application and user base. Everything that was already available could remain part of that open educational resource, even though some of it is going into the book. The way that the book is set up is different than the way that the website is set up in terms of organization. There're also additional materials in the book that aren't on the website. The website is for an instructor, and the book is specific to students. My editor and I talked about audience and how the material was curated and who it was being presented for." **Paula Maust**

It is also incredibly important to our musician-scholars to make sure that their decisions are mission aligned. They consider their mission when planning a project or writing a grant and how it aligns with the way their work will be shared.

> "I was willing to walk away and say, 'Thank you very much for your time,' and not proceed with the project if it felt like it was going to compromise my values. I know that we don't always have those kinds of choices. That's a powerful privilege to feel like that in a situation." **Paula Maust**

> "Because I'm Japanese, I have so much respect for tradition. I think that we're building on the past. I'm going with my intuition to see what kind of information I can get because I don't exactly know what I'm going for. There's really no roadmap." **Kyoko Kitamura**

> "What denies us in this current age the right to make choices and to change how things are performed? You should ask the people who are telling you that something has to be done a certain way to share why their opinion is that way. Asking lots of 'why' questions. You'll get to learn about why they have this opinion. It's finding ways to have that conversation and asking 'why' questions that can lead to great growth for everyone in the room." **Robin McGinness**

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1. Paula Maust, *Expanding the Music Theory Canon: Inclusive Examples for Analysis from the Common Practice Period* (Albany: State University of New York Press, 2024), https://public.ebookcentral.proquest.com/choice/PublicFullRecord.aspx?p=30562218.
2. Paula Maust, "Expanding the Music Theory Canon," August 27, 2020, https://www.expandingthemusictheorycanon.com/.

Our expert musician-scholars are also finding valuable ways to share scholarship in nontraditional formats and media outside of traditional publishing models.

> One of the most obvious ways that has a connection to the work I do for LAUNCHPad is promotional material if you're a performer, right? This is the stuff that really helps get people excited and integrated into what you're creating. So, if you can talk about, like, 'Oh here's this cool nugget of information about this piece that I'm performing. I'm going to share it with you in a video.' Who's not going to get more excited to come hear that piece and hear how you're using that information in your interpretation? That is, to me, the gold standard. We should share the information, share it in the medium that makes sense, integrate it into advocating for the art, and advocate for the performance. It obviously doesn't look like a research paper, but that's okay." **Robin McGinness**

> "Open access is important to me because I want people in academia, regardless of what kind of institutional access they have, to be able to read the work. But I also want it to be freely available to people outside of academia and to the people that I worked with. That is really important to me. But it's not free, right? I was fortunate to get some subvention grants that helped offset the costs, mainly of making this an open-access resource. The press that I worked with, University of Michigan Press, is invested in open access as well. It found some funding. But it's not free, and it's not something that everyone can do, even if they want to. These are different factors that I think about—where I want to publish or where I want to share some work." **Lauron Kehrer**

Our expert musician-scholars also aren't completely free from the systems we must consider when making decisions about publishing. They also are aware of how things like copyright impact the way we share and how and where we can access the scholarly and musical record.

> "One of the things that I find to be so challenging about intellectual research right now is that so much of it is still locked up. It's not something that you can access if you don't have a connection to an academic institution that values research enough to spend the significant amount of money to subscribe to those. It's the same with journal articles and with academic monographs that are incredibly expensive. The author's not really making any money on those very expensive books, and they're inaccessible to most people. Research is something that should be shared with the broadest possible group of interested people. Of course, not everyone is going to be interested in knowing about a woman writing harpsichord lessons in 1756 the way that I am. But lots of people could be interested in that who wouldn't otherwise have access to that information without those expensive subscription services." **Paula Maust**

> "I view it as both a challenge and an opportunity. My resources are limited, so I know what I'm good at and what I enjoy doing. I want to focus my energy on training teachers, training teaching artist development programs. I don't always have the time to formalize the kinds of research that I'm doing informally. But the opportunity in having limited resources is that I've developed my organization with partnerships in mind. I have Throughline Arts as my organization, so I can provide my individual services. I recently did a project that shows an example of the kind of

collaborative approach that shows how I can pull in expertise from different people." **Christina Farrell**

"I've always found the copyright laws for recording fascinating, and the royalty system that exists in almost every other art form than classical music is fascinating when we're talking about copyrighting licenses of particularly recordings. Some of my most thrilling recordings that I like listening to are free on YouTube. It boggles me why that sort of history has been enabled for this art form. That's something I would love to see change because there's something about the ownership of a particular performance—the ownership of that research, if you will—when you are doing a live performance that should at least have an identity for the artist." **Jonathan Heyward**

"Being with the Lincoln Center, there's a huge archival department I now have complete access to. However, there is also a lot more that I have to do to go out and get more research. But that to me is a wonderful challenge because what it does is streamline my thinking and allows me to really go directly to something a bit more specific. In a way, being in an institution, you feel like you've got everything at hand, and you go in many different directions. But as an individual researching, you're trying to figure out the piece to the puzzle that you may need to get the whole piece. Accessibility isn't as easy, but in a way, it feels like I've had the ability to streamline my process. That's pretty exciting." **Jonathon Heyward**

"It would be nice to get paid for publication, but that also doesn't fix the problem of access. Paywalls are a problem. I think more and more, we're seeing open-access journals, which is great. That means that the work is more widely available. That speaks to the larger issue of how little we fund higher education in the United States more generally. We don't have the same models to support making our work widely available. In terms of tenure and promotion policies, the kind of public scholarship and the value that has and could have for a university could also reshape how committees are looking at different types of publications." **Lauron Kehrer**

"If it's an American Indian subject, it needs to be open access. … It's really important to create access for people. I'm very encouraged by just looking at the statistics, the open-access stuff is clearly read and distributed far more readily. All of the open-access things get way more reads, and I think that's important.

Especially with the Indigenous AI position paper, since it's free and open online, we do get contacted often by a tribal leadership in the U.S. and Canada. That means that Concordia University has done a good job of making it accessible. They're finding it. I'm very proud of that work, and the original artificial intelligence paper that I put out with Lewis, Arista, and Pechawis[3] because it is on a lot of syllabi. That is extremely meaningful to me, to know that I am on syllabi and that young people everywhere are reading my writing." **Suzanne Kite**

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3. Lewis, J. E., Arista, N., Pechawis, A., & Kite, S. (2018). Making Kin with the Machines. Journal of Design and Science. https://doi.org/10.21428/bfafd97b

The insights and experiences shared by our expert musician-scholars reflect the current state of publishing and hint at emerging trends and possibilities. Musicians-scholars continue to experiment with nontraditional publishing avenues, place greater emphasis on open access, and explore innovative ways of integrating technology into their publishing strategy. They are motivated to find publishing opportunities that provide increased flexibility, creativity, and a stronger alignment with their personal values and artistic missions.

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13

CODA: ARTIFICIAL INTELLIGENCE

Kathleen DeLaurenti

"I've also gone from feeling like I was the only person using some of these tools to being in a sea of people using them. Right now, when we think of AI, the general public is using natural language processing, and it's generative adversarial networks and their offspring. Artificial Intelligence is theoretical and, in my opinion, does not actually exist. What we're dealing with is really big statistics—really, really big—but beyond that, it's not artificial—it's drawing from human activity, and it's not intelligent.

I'm not very interested in those things anymore. Because they've taken out all the unpredictability, and without unpredictability, it's no fun as an artist. And so now, that leaves me with it to go back to

> *the drawing board with building artificial intelligence tools that say: What about the types of artificial intelligence we've left behind and the pursuit of mimicry? What about the actual materials themselves and their intelligences in the communities they're from, such as* Stones*, which is part of my research? I think there are still a lot of questions to be answered. So I am currently very bored by AI, but hopefully it'll make some new problems for me to be concerned with."* **Suzanne Kite**

In 2022, OpenAI made its ChatGPT tool widely available to the public for free for the first time. Since then, news outlets and college campuses have been buzzing with conversations about how **artificial intelligence** tools built on **large language models**, LLMs, such as ChatGPT and Google's Gemini, will fundamentally change the ways we create and access knowledge.

AI tools are built on computer processing engines called neural networks. Modelled on the node-like structure of the human brain, neural networks were developed to process language naturally. These new AI tools utilize neural networks to analyze data and produce results based on your prompts and inputs. In the Chapter 4: Preparing to Search, we note that computers don't speak English, Mandarin, or Spanish. But computer scientists have been working for some time to create better tools to translate the language humans use to the ones and zeros that power computer programs. ChatGPT, and other AI tools are the first publicly available attempts at making it easier for computers to understand how you speak and respond in a way that a person understands.

Responses to using these generative tools for research and music have been mixed. Some artists find benefits to expanding their practice, while others are concerned about computers getting more commissions than artists.[1] Librarians, students, and faculty have also been concerned about **hallucinations** in LLM tools, where the tools display outputs that try to fill in the gaps in training or demonstrate bias that has occurred in a data set.[2] For example, students who have tried to take shortcuts on assignments have asked ChatGPT to provide a bibliography on a research topic; sometimes ChaptGPT provides lists of articles that don't exist. As recently as February 2024, the authors and their students were surprised to read citations to articles provided by ChatGPT that don't exist. Perhaps more troubling, these articles seem like they *could* exist because they feature known scholars or journals with titles to research articles those scholars work in. However, the articles or even books simply don't exist.

Google has announced plans to implement additional **LLM** technology in its primary search results. While the goal is to provide more context and specific results, there are some things to be wary of when using these tools. Some Google users are already seeing the **snippet** results that try to provide direct answers in your Google results page returning different answers to the same question asked by different people. This technology is new and it is important to be a little skeptical of changes you notice in tools you have used for a long time.

In music, AI is being used for everything from having your favorite artist perform someone else's songs[3] to creating and mastering original music. These AI-based tools have learned faster than a human ever

1. Spring 2023 AI Listening Sessions | U.S. Copyright Office," accessed November 27, 2023, https://www.copyright.gov/ai/listening-sessions.html.
2. "What Are AI Hallucinations? | IBM," accessed November 27, 2023, https://www.ibm.com/topics/ai-hallucinations.
3. "AI Kim Seokjin / Jin (BTS) Voice Generator | Voicify AI Cover Generator," Voicify AI, accessed November 29, 2023, https://www.voicify.ai/custom-kim-seokjin--jin-bts.

could from listening to—or more accurately, training on—massive data sets of music. An astounding 43 years after John Lennon's death, a new song by The Beatles, "Now and Then," was made possible by noise reduction and feature extraction models trained by AI.[4]

These uses seem like good applications of AI tools. Some artists including Troye Sivan, John Legend, and Charlie Puth have even collaborated with Google on Dream Track, so other creators can use their voices to make new music and post it on Google platforms.[5] About his decision to participate, Legend notes, "As an artist, I am happy to have a seat at the table, and I look forward to seeing what the creators dream up during this period."[6]

It can be fun to play with this technology and imagine what might be possible. Yet, many advocate for balance and caution as powerful new technologies are introduced. In their book *Key Changes*, Bill Rosenblatt and Howie Singer outline the ways that technology has influenced music in the last 125 years. The transitions from radio to CDs to streaming have impacted not only the way people consume music but also how music is made. The exponential growth of the streaming industry and the formula for calculating royalties has led musicians to make songs 30 seconds shorter on average.[7]

Considering both present and anticipated technological advances, we encourage musician-scholars to reflect on these questions:

- How will these new technologies influence music?
- What kinds of bias might we see introduced by these tools into the system?
- Will every song start to sound the same?
- How do we continue to find ways to pursue mission-driven creative research and sustainable artistic careers in a world where algorithms are deciding what is popular and who gets funded?

It is an important time to play, explore, investigate, and participate in conversations where you can voice concerns. Researchers including Timnit Gebru, Safiya Noble, and Joy Buolamwini have been strong advocates for thoughtful development that ensures new technologies do not perpetuate institutional bias.[8] For instance, Adobe sold fake images of the Israeli-Palestine conflict. [9] When asked "What is an African country starting with the letter 'K'?", Google recently responded "None." The over

4. "Listen to the Last New Beatles' Song with John, Paul, George, Ringo and AI Tech," AP News, November 2, 2023, https://apnews.com/article/beatles-last-song-now-then-release-fbce70071b4624f0d90bd18347f20fc6.
5. "Transforming the Future of Music Creation," Google DeepMind, November 16, 2023, https://deepmind.google/discover/blog/transforming-the-future-of-music-creation/.
6. Chloe Veltman, "Google's Latest AI Music Tool Creates Tracks Using Famous Singers' Voice Clones," NPR, November 17, 2023, sec. Music, https://www.npr.org/2023/11/17/1213551049/googles-latest-ai-music-tool-creates-tracks-using-famous-singers-voice-clones.
7. Howie Singer, Key Changes: The 10 Times Technology Transformed the Music Industry (New York, NY: Oxford University Press, 2023).
8. Lorena O'Neil, "These Women Tried to Warn Us About AI," Rolling Stone (blog), August 12, 2023, https://www.rollingstone.com/culture/culture-features/women-warnings-ai-danger-risk-before-chatgpt-1234804367/.
9. Kylie Kirschner, "Adobe Is Selling AI-Generated Images of the Israel-Hamas War, and Some Websites Are Using Them without Marking That They're Fake," Business Insider, accessed November 29, 2023, https://www.businessinsider.com/adobe-stock-ai-generated-images-israel-hamas-war-2023-11.

50 million people living in Kenya would disagree.[10] While mistakes are expected as a new technology becomes widespread, Google's decision not to adjust its **algorithm** to a ddress search results that prioritize factually incorrect responses is concerning.

It is easy to feel overwhelmed by—and then disengage from—the complexities and potential risks of generative AI. Despite these challenges, understanding the fundamentals of information systems empowers us to make ethical and informed decisions. This knowledge is crucial for efficient research, copyright, and publishing in the creative field. We look forward to future updates to this open textbook that reflect the evolving impact of these advances in our systems and provide new approaches to creating artistic work.

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GLOSSARY

adaptive technology

software or hardware that is designed to help persons with disabilities access digital content

algorithm

a process or order of computations that determines how search results or information is presented in an online search tool

archival silence

gaps in primary source collections that can be unintentional or intentional that silence some voices in archival collections

archive

archive as a verb is the practice of collecting, arranging, and preserving materials in libraries, archives, and museums. an archive can also describe a place where this activity happens that provides access to material in person and online

artificial intelligence

a term currently used to describe tools based on large language models that respond to natural language questions with text, image, or media-based responses

artistic mission

a written expression of your current artistic goals and motivations

browser extension

a small application that is designed to be added to a specific browser; popular information-focused extensions include tools to find open access versions of articles, privacy extensions to protect your privacy, and ad blocking extensions

call numbers

the numbers applied to physical books, scores, films, or audio recordings in a library that help you locate them on the shelf

card catalog

the set of cards arranged by title, author, or subject that helped users find books on the shelf in a library before online catalogs were developed

catalog

an organized list of materials that has been curated by an organization, often libraries, for access by their community; catalogs point to information sources that might be available in a physical space or online

citation manager

a software tool that helps you collect, manage, and cite resources for your research-creation projects

collecting agency

any agency authorized to collect any kind of royalty on behalf of a copyright holder; in the U.S. this includes performing rights organizations

copyright holder

the person, company, or organization that owns the exclusive rights to a copyrighted work

copyright infringement

the act of exercising an exclusive right of someone else's copyrighted work without that copyright holder's permission

copyright management plan

a plan where you manage the actual permissions process and document permissions granted for using copyrighted works in your research-creation project

crawl

the act of collecting information about websites for the purpose of creating a searchable set of data

creation-as-research

a process of challenging what constitutes research by making space for creative material and process-focused research-outcomes. (see Chapman and Sawchuck)

Creative Commons

an organization that manages an international set of licenses that allow a copyright holder to determine what users can do with a copyrighted work without seeking permission

creative commons license

one of six licenses managed by creative commons that copyright holders use to give permission in advance to share, reuse, and adapt their copyrighted works by following specified conditions on how the work must be cited, shared, or modified

creative presentation of research

an alternative form of research dissemination and knowledge mobilization linked to such projects (see Chapman and Sawchuck)

database

a collection of data objects and their associated metadata that is organized for search and access

dramaturgy

the study of elements and dramatic presentation of a work on the stage

editorial board

a group of experts that manage review and publication of scholarly books or articles for a scholarly journal or publisher

empirical research

the research created by analyzing data that is observed or collected through experimentation

fair use

an exception to copyright law that allows the use of copyrighted work without permission in some situations

fieldwork

in ethnomusicology, the practice of observing and participating in music making and related activities as part of your research methodology

freemium

a term used to describe models where a user needs to create an account but can access information for free in exchange for ad placement

fuzzy search

the use of an algorithm to search which is not literal and may return results based on likely relevance even though search terms and spellings may not be an exact match

grand right

a right that performers must license from the copyright holder (often a publisher) to publicly perform a dramatic work such as a musical, play, opera, or ballet.

hallucination

a term used to describe the phenomenon of large language models like ChatGPT returning incorrect information

index

a list of articles or other publications within a discipline or topic; provides bibliographic information such as author(s), title, where it was published, and sometimes abstracts

information life cycle

a map that demonstrates how publishing influences the way information is shared over time.

information need

a recognition that you need information to answer a question. information needs occur in daily life and research practices

interlibrary loan

a system used by libraries to allow users at one library to request items that are in the collection of another library

interpolate

the process of taking a part of an existing musical work (not the sound recording) and incorporating it into a new work; classical musicians often refer to this as musical quotation

large learning model (LLM)

a type of software model that is programmed to simulate natural language interactions

Library of Congress Subject Headings

a list of specific subject terms managed by the Library of Congress that are applied to books, movies, and music in library catalogs in the United States and allow you to find all materials on a subject in a library

master use license

a license that allows someone to use a master sound recording in an audio-visual work or as a sample in a new musical work

mechanical license

a license that is necessary to reproduce musical works on streaming platforms, digital downloads, and physical media such as compact disc or vinyl

memory institutions

an organization that maintains a history of public knowledge by collecting and preserving culture

metadata

a set of data that describes and gives information about other data; for example the title of a book is a piece of metadata

methodology

a systematic approach used by a discipline to conduct research

methods

a research activity that can be associated with one or more methodologies

mind map

a diagram used to visually organize information into a hierarchy, showing relationships among pieces of the whole; It is often created around a single concept, drawn as an image in the center of a blank page, to which associated representations of ideas such as images, words and parts of words are added.

modality

a lens or perspective that you are operating in when approaching your research project

musician-scholar

a musician who has integrated research into their artistic identity and practices

non-blanket licensee

a music digital service provider that offers streaming or direct digital downloads that is not covered by the Mechanical Licensing Collective (for example, Bandcamp.com)

ontology

the philosophical practice of questioning what exists and what does not exist

open access

a term that describes scholarly publications that are freely available to the public

open education practice

the teaching and learning practices that leverage open, participatory tools to enable collaborative, open learning experiences that often produce open educational resources

open educational resource

any textbook or learning material that is made available under an open license that allows instructors and learners to retain, reuse, remix, revise, and redistribute the material

open license

any type of license that allows for different kinds of reuse, remixing, or redistributing.

open pedagogy

an approach to teaching that allows students learn by creating teaching or other educational materials that are designed to be freely available to a public audience

open textbook

a textbook that is freely available for instructors and students to retain, reuse, remix, revise, and redistribute

paywall

the phenomenon of trying to access an information source that can only be viewed, listened to, or interacted with after paying a fee

peer-review

the process of having your scholarly article or book reviewed by academic peers that have expertise in the same field of research

performing rights organization

a membership organization that collects royalties for public performances and distributes them to publishers and composer/songwriters

pirate site

a website that hosts information sources without permission from the copyright holder

platform

a digital distribution service that makes a curated or user generated set of content available to the public or subscribers

praxis

the act of putting theories or ideas into action or ready for external expressions

premium streaming model

a subscription model that provides access to specific content to subscribers, sometimes with benefits such as ad-free experiences

primary source

an information source that provides information as close as possible to first-hand from when an event of phenomenon happened

public domain

the public domain refers to information sources whose copyright has expired. any information sources that are in the public domain can be freely reused without permissions.

public performance

defined in copyright law as a performance that is "open to the public or at any place where a substantial number of persons outside of a normal circle of a family and its social acquaintances is gathered" or by transmitting the work to be received remotely by the public

reception history

a research methodology focused on analyzing how a musical work was received and understood at the time that it first premiered to a public audience

research database

a collection of research resources and their associated metadata that is organized for search and access

research journal

a personal journal that you develop to document all stages of your research-creation project.

research question

a central question or thesis that serves as the central inquiry of a specific research-creation project

research-as-creation

research-creation

research that includes performative or non-text creative aspects as the result, motivation, or methodology for the research itself (see Chapman and Sawchuck)

research-for-creation

the gathering of materials, practices, technologies, collaborators, narratives, and theoretical frames that characterizes initial stages of creative work and occurs iteratively throughout a project (see Chapman and Sawchuck)

research-from-creation

the extrapolation of theoretical, methodological, ethnographic, or other insights from creative processes, which are then looped back into the project that generated them (see Chapman and Sawchuck)

resource

a published or unpublished source of information in any media or format that helps to address your information need

rights inventory

a comprehensive list of the copyrights involved in a given research-creation project

royalty

the payment you receive for a licensed use of your copyrighted musical work or sound recording

sample

an excerpt of a sound recording that is used in a new musical work

scholarly article

an article published in a scholarly journal that has been peer-reviewed; also often called a peer-reviewed or academic article

scholarly book

a book that is peer-reviewed and published by a scholarly press primarily for an academic audience

scholarly journal

a journal published regularly that includes scholarly articles in a specific field of research; they are also referred to as peer-reviewed or academic journals

scholarly publisher

a publisher that specializes in publishing scholarly journals or books

scholarly society

a membership organization for scholars whose research is similar

search engine

a program that searches for and identifies items in a database that correspond to keywords or characters specified by the user, used especially for finding particular sites on the World Wide Web.

secondary source

an information source, typically a scholarly book or scholarly article, that analyzes primary sources or empirical data

self-publishing platform

a website service that allows composers and songwriters to sell physical copies or license digital copies of their work to customers

snippet

a small portion of a work that is accessible during a search when full-text is not available

statutory

required by law; in the case of music royalties, these are royalties that are defined in copyright law

synchronization license

the license required to synchronize music to any kind of film or podcast; this includes synchronizing music to video from a live performance [also called a sync license]

takedowns

a legal process where a copyright holder can require a platform to remove your work from distribution because it infringes copyright

tertiary source

an information source that summarizes secondary research to provide overviews of a topic; tertiary sources written for scholarly use are generally organized by discipline or topic

website cookie

a piece of data from that a website stores on your computer that the website can retrieve at a later time

work for hire

when you create a copyrightable work as part of the scope of your employment, it is a work for hire and your employer is the legal copyright holder of that work

ABOUT THE ARTISTS

Throughout the book, we spotlight a diverse group of musician-scholars who integrate research into their creative and professional endeavors. These experts share insights into how they navigate the intricacies of copyright and publishing within their work. Featuring detailed profiles of each artist, this section offers a closer look at their journeys and contributions to the field.

Christina Farrell

Christina Farrell specializes in arts integration and has over twenty years of experience as a teaching artist, consultant, and professional development facilitator. The founding director of Throughline Arts, she is a Master Teaching Artist with the Wolf Trap Institute for Early Learning Through the Arts, and has provided early childhood residencies, educator mentoring and teaching artist training across the U.S., Singapore, India, and South Korea. She has facilitated professional development workshops for educators in partnership with Kennedy Center Education, Pittsburgh Cultural Trust, and Turnaround Arts. In 2005, Christina founded Opera Ignite, whose premier early childhood residency program "An Opera is a Story" has served 1800+ children since 2010 in partnership with Toledo Opera and Pittsburgh Festival Opera. She is a member of the Teaching Artists Guild National Advisory Council and is an alumnus of Lincoln Center Education's Leadership Lab under the direction of Eric Booth.

Christina has performed with Washington National Opera, Baltimore's Opera Vivente, Opera Theater of Pittsburgh, Westmoreland Symphony Orchestra, Revival Theatre Company, and at the Kennedy Center for the Performing Arts as a Finalist with the National Symphony Orchestra's Young Soloists' Competition. She is a 2011 recipient of the Fred Rogers Memorial Scholarship presented by the Television Academy of Arts and Sciences. Christina holds a bachelors degree in Vocal Performance from Carnegie Mellon University and a masters in Educational Theatre from New York University.[1]

1. https://throughlinearts.org/about/

Jonathan Heyward

Jonathon Heyward is forging a career as one of the most exciting conductors on the international scene. He currently serves as Music Director of the Baltimore Symphony Orchestra, having made his debut with the BSO in March 2022 in three performances that included their first-ever performance of Shostakovich's Symphony No. 15. In summer 2024, Jonathon will become Renée and Robert Belfer Music Director of the Festival Orchestra of Lincoln Center. This appointment follows a highly acclaimed Lincoln Center debut with the Mostly Mozart Festival Orchestra in summer 2022, as part of their Summer for the City festival. Jonathon is committed to education and community outreach work, as well as including new music within his imaginative concert programs.

Jonathon's recent and future guest conducting highlights in the United Kingdom include debuts and re-invitations with the London Symphony Orchestra, BBC National Orchestra of Wales, BBC Symphony, Royal Scottish National Orchestra, The Hallé in Manchester, National Symphony Orchestra Ireland, City of Birmingham Symphony Orchestra, Royal Academy of Music, and Scottish Chamber Orchestra. In continental Europe, amongst Jonathon's recent and forthcoming debuts are collaborations with the Castilla y León Symphony, Galicia Symphony, Danish National Symphony, Orchestre de Chambre de Lausanne, Brussels Philharmonic, Orchestre National Bordeaux Aquitaine, Tonhalle Düsseldorf, Hamburg Symphony, MDR-Leipzig Symphony, NDR Elbphilharmonie Orchester.

In high demand in the USA, and in addition to his Music Director positions, Jonathon conducts prominent orchestras such as the New York Philharmonic; the Atlanta, Detroit, Houston, Seattle, Dallas, and St Louis symphonies; and the Minnesota Orchestra.

Born in Charleston, South Carolina, Jonathon began his musical training as a cellist at the age of ten and started conducting while still at school. He studied conducting at the Boston Conservatory of Music, where he became assistant conductor of the prestigious institution's opera department and of the Boston Opera Collaborative, and he received postgraduate lessons from Sian Edwards at London's Royal Academy of Music. Before leaving the Academy, he was appointed assistant conductor of the Hallé Orchestra, where he was mentored by Sir Mark Elder, and became Music Director of the Hallé Youth Orchestra. In 2023, he was named a Fellow of the Royal Academy of Music; an honor reserved for Academy alumni. [2]

2. https://jonathonheyward.com/about#bio

Lauron Kehrer

Lauron Kehrer is a musicologist and ethnomusicologist studying the intersections of race, gender, and sexuality in American popular music. They are an Assistant Professor of Ethnomusicology and Musicology in the Irving S. Gilmore School of Music at Western Michigan University where they teach courses in popular music, global music cultures, and western art music. Lauron has published articles on queer identity and women's music, white rapper Macklemore's LGBTQ activism, and queer resonances in the work of Beyoncé in the journals *American Music*, the *Journal of the Society for American Music*, and *Popular Music and Society*, respectively. The latter received honorable mention for the 2020 Marcia Herndon Prize for exceptional ethnomusicological work in gender and sexuality from the Society for Ethnomusicology. Their book, *Queer Voices in Hip Hop: Cultures, Communities, and Contemporary Performance* (University of Michigan Press, Tracking Pop series, Fall 2022) examines the work of queer and trans artists in hip hop. Lauron served in various roles within the American Musicological Society, the Society for Ethnomusicology, the Society for American Music, and the International Association for the Study of Popular Music – U.S. Branch.

Originally from Ann Arbor, Michigan, Lauron received a Ph.D. in Musicology from the Eastman School of Music, University of Rochester, where their dissertation received the Alfred Mann Dissertation Award from the Eastman School of Music, and the Susan B. Anthony Dissertation Award from the Susan B. Anthony Institute for Gender, Sexuality, and Women's Studies. Lauron also completed a MA in Ethnomusicology at Eastman, a Graduate Certificate in Women and Gender Studies from the Susan B. Anthony Institute, a bachelor's degree (BM) in Flute Performance, as well as an undergraduate specialization in Women, Gender, and Social Justice from Michigan State University.[3]

3. https://www.lauronkehrer.com/about

Kyoko Kitamura

Kyoko Kitamura is a vocal improviser, bandleader, composer, and educator based in Brooklyn, New York. She currently co-leads Geometry (with Taylor Ho Bynum, Joe Morris, Tomeka Reid), performs in Siren Xypher, a trio with violist Melanie Dyer and pianist Mara Rosenbloom, and appears on albums by William Parker, Cory Smythe, and Russ Lossing. For over a decade, Kitamura worked with legendary musician and composer Anthony Braxton. She is featured on many of his releases including *GTM (Syntax) 2017*, the 12-hour recording of his vocal works performed by the Tri-Centric Vocal Ensemble which she directed and co-produced, as well as his operas *Trillium E* and *Trillium J*. Kitamura is the creator of *Introduction to Syntactical Ghost Trance Music*, the 2023 mini-documentary film on Anthony Braxton and his Syntactical Ghost Trance Music system.

Separate from her work in music, Kitamura has had a career as a media professional as foreign news correspondent in Japan covering Iraq, Kuwait and Saudi Arabia. As an educator, she teaches composition for improvisers, the business side of music and the application of musical creativity to other real-life situations. She has taught at many institutions including Dartmouth College, Face the Music (Kaufman Music Center), Arts for Art's Visionary Youth Orchestra and The New School, and as a visiting faculty at Bennington College. Kitamura has performed in major festivals, including Big Ears (Knoxville, TN), JazzFest Berlin (Germany), Moers Festival (Germany), Edition Festival for Other Music (Stockholm, Sweden) and Vision Festival (NYC). A pianist, Kitamura was born in New York City (U.S.A.), raised partially in Tokyo (Japan), spent a few summers in Melbourne (Australia), lived and worked for many years in Paris (France), currently resides in Brooklyn, NY (U.S.A.).[4]

4. https://www.kyokokitamura.com/biography/

Suzanne Kite

Suzanne Kite is an award-winning Oglála Lakȟóta artist, composer, and academic. Her scholarship and practice explore contemporary Lakȟóta ontology (the study of beinghood in Lakȟóta), artificial intelligence, and contemporary art and performance. She creates interfaces and arranges software systems that engage the whole body, in order to imagine new ethical AI protocols that interrogate past, present, and future Lakȟóta philosophies. Her interdisciplinary practice spans sound, video, performances, instrument building, wearable artwork, poetry, books, interactive installations, and more. Her work has been included in publications such as *Atlas of Anomalous AI, Journal of Design and Science* (MIT Press), and *The Funambulist*. Her award-winning article "Making Kin with Machines" and the sculpture Ínyan Iyé (Telling Rock) were featured on the cover of *Canadian Art.* Dr. Kite has been working with machine learning techniques since 2017 and developing body interfaces for performance since 2013.

Her artwork and performance have been featured at numerous venues, including the Hammer Museum, Whitney Museum of American Art, PS122, Anthology Film Archives, Chronus Art Center, and Toronto Biennial of Art. Honors include the Pierre Elliott Trudeau Foundation Scholarship; Tulsa Artist Fellowship; Sundance New Frontiers Story Lab Fellowship, which allowed her to collaborate with top experimental artists and develop a film with AI techniques, *Fever Dream* (2021); Women at Sundance |Adobe Fellowship; and Common Field Fellowship, among others. In fall 2022, she gave a talk at Bard as part of the Disturbance, Re-Animation, and Emergent Archives conference, hosted by the Rethinking Place: Bard-on-Mahicantuck, a three-year project that proposes a Native American and Indigenous Studies approach to revitalize the undergraduate American Studies Program.

Dr. Kite hold a BFA from the California Institute of the Arts, an MFA from Milton Avery Graduate School at Bard College, and a PhD from Concordia University.[5]

5. https://www.bard.edu/faculty/details/?id=5046

Paula Maust

Paula Maust is a performer, scholar, and educator dedicated to fusing research and creative practice to amplify underrepresented voices and advocate for social change. She is the creator of Expanding the Music Theory Canon, an open-source collection of music theory examples by women and people of color. A print anthology based on the project is under contract with SUNY Press, and she is working on a large-scale recording project to create professional recordings of all works on the site that have not yet been commercially recorded. Paula is also one of the early modern area editors for Oxford University Press's women, gender, and sexuality revision of Grove Music Online.

Paula has published articles in Women and Music and the Journal of the International Alliance for Women in Music, and she has presented her research at conferences of the American Musicological Society, the Society for Seventeenth-Century Music, the American Handel Society, the Indiana University Historical Performance Institute, and the Music Theory Society of the Mid-Atlantic. As a harpsichordist and organist, Paula has been praised for combining "great power with masterful subtlety" (DC Metro Theater Arts) and as a "refined and elegant performer" (Boston Musical Intelligencer). As the co-director of Musica Spira, she curates provocative lecture-concerts connecting baroque music to contemporary social issues focused on women. Paula performs extensively as a continuo player with numerous ensembles in the Baltimore-Washington, D.C. region, including the Washington Bach Consort, the Folger Consort, and Third Practice. Currently, she serves a music theory faculty at the Peabody Institute of the Johns Hopkins University. She holds doctorate and master's degrees in harpsichord from Peabody, a master's in organ from the Cleveland Institute of Music, and a bachelors from Valparaiso University.[6]

6. https://www.paulamaust.com/about-me/

Robin McGinness

Robin McGinness is an operatic baritone and career coach interested in finding ways to use theater and games to facilitate professional development, self-management for performers, art song house concerts, and modernizing the operatic repertoire. Currently an instructor of Professional Studies at the Peabody Institute, Robin helped create core classes of the Breakthrough Curriculum, Building a Brand and Portfolio, and Pitching Your Creative Idea. Robin also co-authored Peabody's first open educational resource title, *The Path to Funding: The Artist's Guide to Building Your Audience, Generating Income, and Realizing Career Sustainability*. A staff member of LAUNCHPad, Peabody's career services office, since 2015, Robin has invested years in helping both undergraduate and graduate students prepare for their lives after school. Robin also co-hosts MaxQ, Peabody LAUNCHPad's podcast focused on exploring what life is like for recent Peabody graduates.

As a baritone soloist, Robin has performed in the Kennedy Center Concert Hall and Carnegie Hall's Stern Auditorium. Other recent performances include Carmina Burana with Maryland Symphony Orchestra, Duruflé Requiem with the Peabody Symphony Orchestra, and Brahms Requiem with The Washington Chorus, a performance praised by the Washington Post for its "warm baritone." Robin holds degrees from Oberlin Conservatory and the Peabody Institute. Previously, McGinness has been a resident artist at Opera Theater St. Louis, Pittsburgh Festival Opera, Teatro Nuovo, and Bel Canto at Caramoor and was the Baritone Studio Artist in the Arizona Opera Marion Roose Pullin Opera Studio. An award-winning performer, Robin placed first in the Sylvia Greene Vocal Competition, second in the Piccola Opera Competition, and received the Patricia A. Edwards Award in the Annapolis Opera Vocal Competition.[7]

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7. https://www.rob-mcginness.com/#bio

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ABOUT THE AUTHORS

Andrea I. Copland

Andrea I. Copland is an oboist, music historian, and librarian based in Baltimore, MD. Andrea has dual master's of music degrees in oboe performance and music history from the Peabody Institute of the Johns Hopkins University and is currently Research Coordinator at the Répertoire International de la Presse Musicale (RIPM) database. She is also a teaching artist with the Baltimore Symphony Orchestra's OrchKids program and writes a public musicology blog, Outward Sound, on substack.

Kathleen DeLaurenti

Kathleen DeLaurenti is the Director of the Arthur Friedheim Library at the Peabody Institute of The Johns Hopkins University where she also teaches *Foundations of Music Research* in the graduate program. Previously, she served as scholarly communication librarian at the College of William and Mary where she participated in establishing state-wide open educational resources (OER) initiatives. She is co-chair of the Music Library Association (MLA) Legislation Committee as well as a member of the Copyright Education sub-committee of the American Library Association (ALA) and is past winner of the ALA Robert Oakley Memorial Scholarship for copyright research. DeLaurenti is passionate about copyright education, especially for musicians. She is active in communities of practice working on music copyright education, sustainable economic models for artists and musicians, and policy for a balanced copyright system. DeLaurenti served as the inaugural Open Access Editor of MLA and continues to serve on the MLA Open Access Editorial Board.

She holds an MLIS from the University of Washington and a BFA in vocal performance from Carnegie Mellon University.

ABOUT THE TEAM

Chartae' Anderson

Chartae' Anderson has spent 7 years in the educational industry gaining experience in teaching, learning design, course development, and learning technology. She began her career as an elementary school teacher in Baltimore City where she taught 1st, 2nd, and 3rd grades. In 2020, she transitioned to the edtech industry where she designed and developed course content and integrated learning technologies in undergraduate and graduate degree programs. Anderson embodies a student-centered approach to course design and development. She is currently working on eLearning projects that combine her love of visual design and education to address the unique needs of learners.

She earned a BA in Psychology from Denison University, a MSEd with a concentration in Special Education and Elementary Education from Johns Hopkins University, and a MicroMasters certificate in Instructional Design and Technology from the University of Maryland Global Campus.

Christopher DeLaurenti

Christopher DeLaurenti has been a freelance writer and editor since 1999. He holds an MFA from Bard College and a PhD from Goldsmiths, University of London. Christopher's articles, essays, and reviews have appeared in countless newspapers, magazines, books, and journals, including *The Seattle Times, MSN Music, The Stranger, Earshot Jazz, Signal to Noise, The Believer, New Music Box, Resonance: The Journal of Sound and Culture, The Tentacle, Musicworks,* and *Imagined Theatres.*

Valerie Hartman

Valerie Hartman is the Senior Instructional Designer for the Peabody Institute of The Johns Hopkins University. Solid editing and visual design skills, reinforced with a strong background in pedagogy and technology, allow her to present key messages with clarity and style. Hartman partners with faculty to create learning experiences that motivate students, improve comprehension, and foster the application of new skills.

She earned a Bachelor of Business Administration in Finance and Management from the University of Houston and a Master of Science in Professional Writing in the Public and Private Sectors from Towson University. She teaches online graduate level courses in multimedia and e-learning design and development. A doctorate candidate in Instructional Technology at Towson University, her research interests lie at the intersection of creativity, learning, and technology.

Don Lowing

Don Lowing brings over two decades of professional design experience across higher education, branding and identity, graphics, motion graphics, and film, with a focus on crafting experiences that resonate with the market. Utilizing user-centered design methods, Lowing fosters a collaborative

approach to developing innovative design solutions that inspire and engage audiences while aligning with organizational goals.

His educational background is as diverse as his creative portfolio. He holds an Executive MBA from The SJU Haub School of Business in Philadelphia, complemented by a Bachelor of Fine Arts degree from the University of the Arts, Philadelphia, specializing in Film and Motion Graphics with secondary focuses in graphic design and sculpture. Additionally, Lowing earned a Culinary Arts degree, enriching his creative perspective and contributing to his multidisciplinary approach to design. His sculptural works have garnered recognition across 40 U.S. states, Canada, South America, and Europe, reflecting their commitment to excellence and their ability to transcend boundaries through art and design.

Joseph Montcalmo

Joseph Montcalmo has spent over 20 years building, developing, deploying, and teaching educational content, courses, and programs. He has created online learning business plans for multiple universities; participated in the creation of 30+ online/hybrid degree programs and hundreds of courses; created, edited, and published a variety of multimedia; has experience with learning space design and theory; and teaches online at the graduate level. Montcalmo has presented on topics including effective collaboration, pedagogy, integration of technology into teaching and learning, action research, and approaches to successful leadership.

He earned his Bachelor of Science in Mathematics and Master of Business Administration with a focus on Management and Leadership from Saint Joseph's University in Philadelphia.

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OTHER TITLES BY PEABODY

The Path to Funding: The Artist's Guide to Building Your Audience, Generating Income, and Realizing Career Sustainability

Authors: Zane Forshee, Christina Manceor, and Robin McGinness

Based on coursework developed at Peabody Conservatory, this book breaks down the process of developing an artist mission statement, generating new ideas for creative projects, and creating an engaging project description. It also covers methods for artists to identify their audience, generate a comprehensive project budget, collect compelling work samples, and identify potential funders to support their creative work. Written by a team of active artists and educators, this resource provides creatives with tools and strategies to communicate passionately and effectively about their work and take control of their financial and artistic future.

https://pressbooks.pub/pathtofunding/

ABOUT THE PEABODY INSTITUTE

The Peabody Institute of the Johns Hopkins University advances a dynamic, 21st-century model of the performing arts, building on its rich history of innovation and leadership as the first conservatory in the United States. Comprising both a Conservatory for undergraduate and graduate studies and the Preparatory, Baltimore's largest community performing arts school, Peabody empowers musicians and dancers from diverse backgrounds to create and perform at the highest level. Courses of study range from classical and jazz performance, ballet, and modern dance to cutting-edge programs in acoustics, recording arts and sciences, and music for new media, taught alongside the Conservatory's signature Breakthrough Curriculum, a career development framework that prepares citizen-artists to help shape the future of the field and serve their communities.

A division of Johns Hopkins, one of the world's preeminent research universities and medical institutions, Peabody provides opportunities for interdisciplinary studies through its dual degree program and important initiatives in both arts-in-healthcare and clinical care for performing artists. A leading voice at the intersection of art and education, Peabody is also a convener of critical discourse, providing platforms for a broad range of artistic perspectives to engage with current issues and critical ideas in the cultural sector.

To learn more about the Peabody Institute, visit https://peabody.jhu.edu/.