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And They Were There-Reports of Meetings-The Charleston Conference 1996 and the Faxon Institute

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Musings Regarding the
“Money Talks” Conference:
Charleston 1996

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The Charleston Conference is a rich
resource for the continuing education of
those working with the scholarly commu-
nications processes of publication, distri-
bution, and access. In reflecting up
on the meeting this year, I saw the follow-
ing threads throughout the many presenta-
tions: an increased level of cooperation among
the players, more consortial arrangements,
and a greater awareness (as a result of experience)
of the investments technology requires. However, it was the fact
that we are now describing the results of collabora-
tive efforts rather than talking about
the need to talk that impressed me most
about the various reports.

William Snyder, Chancellor of the
University of Tennessee, rightly described
providing information technology as im-
perative for those in higher education. As
Dr. Snyder so aptly put it, the role of
the teacher in the future will not be the “sage
on the stage” but the “guide on the side.”
In addition to noting the need for a solid
infrastructure to deliver information to our
customers, Dr. Snyder pointed out that we
must deal with information overload and
the need to move from collecting data to
organizing it into information to con-
ceptualizing it into knowledge.

James Stephens, of EBSCO Industries,
described the impacts of change upon us
all and advised the audience to understand
their missions, points of impact from
change, and ways of testing the results of
change. Both he and Dr. Snyder empha-
sized the need for an understanding of the
customer’s needs.

Charles McClure, Professor from
Syracuse University, invited the audience
to consider the decisions and implications
of making the Internet accessible to our
users. He offered six models of access and
indicated that librarians must decide how
they are going to deal with this new re-
source because it will not go away.

Karen Hunter, of Elsevier, was the
fourth keynote speaker. Her talk, “Things
that keep me awake at night,” addressed
concerns about the time and expense in
providing electronic products. She noted
various new developments such as more
consortial arrangements, the need to
define user communities, the lack of clarity
regarding the interlibrary loan aspects of
the electronic environment, parallel pub-
lishing, short-term archival access, long-
term archival access, and pricing. On a
positive note, she expressed the opinion
that publishers have come a long way and
learned a lot about electronic publishing
within the last 5 years.

Skimming over the other panels, here
are a few ideas I gleaned. The CEO panel
discussion centered around the concept of
partnerships of various agencies with one
another. For example, Dan Halloran, of
Academic Book Center, described three
relationships ranging from excellent to
poor. The one that he thought was very
promising was that of a new SDI service
offered by ABC and UnCover whereby

Academic will notify a customer of the
new titles just treated on approval based
upon a subject profile. The excellent one
is that of the PromptCat project whereby
the vendors, OCLC, and the Library are
benefiting from efforts to streamline tech-
nical processing. The area he thinks needs
greater coordination is that between the
library systems vendors and the library
materials vendors. He cited the need for
the ILS vendors to keep the materials ven-
dors informed about changes in their prod-
ucts affecting the supply and invoicing of
materials.

At least two sessions — in what is
becoming a regular part of the conference
— dealt with legal matters. William
Hannay, a lawyer with Schiff Hardin &
Waite, updated the audience on the latest
developments related to fair use and copy-
right issues. Marcia Tuttle, Serials Li-
brarian at UNC-CH, detailed some con-
siderations when dealing with licenses for
electronic materials. While not declaring

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Americans rank first in many areas, but per-capita spending
on books is not one of them. One study shows that American
per-capita spending ranked third. Germans spent the most
with Spain second. Following the U.S. was Great Britain,
fourth, Japan, fifth, and Italy, sixth.
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that a law degree is essential, she did advocate for librarians to pay much closer attention to the contracts they are signing and to learn legalese.

In the Hyde Park session, there was much discussion about how libraries are coping with the inclusion of electronic purchases into their budgets and collections. The idea of using a technology fee from the students attracted a lot of interest. So, also, did the issue of re-visiting the budget allocation approaches of various libraries. Although most libraries did not use an allocation formula for their materials budgets, many noted that they are relaxing the distinctions and divisions among lines in the budget to allow more flexibility and greater responsiveness in meeting funding needs.

Chuck Hamaker’s talk about ongoing analysis of the serials collection (access and usage) at Louisiana State University generated a large number of questions from the audience. Chuck described the serials cancellation projects there and the new access program through UnCover. Using statistics, he illustrated that the journals actually requested by the 6,000 faculty and graduate students who were given access to UnCover were not those identified by the faculty as the most important ones to own. He attributed this discrepancy to the fact that UnCover had revealed titles about which the faculty had not known and illustrated the significance of interdisciplinary materials in research. He is continuing to gather data and plans to publish an article with the results.

After the emphasis upon knowledge about other areas such as publishing, electronic pricing models, legal matters, etc., it was useful to have a session for managers dealing with change. Jack Montgomery’s talk, “Technical Services Reorganization,” really was a tutorial for managers on dealing with the rapid changes in the environment around them. He stresses how the manager needs to be aware of the impact of change upon employees, and the stages they go through in the change process. One particularly provocative suggestion from Jack was for managers to think about what will change in each position within their department as the result of some change. The manager should think what each person stands to lose as well as to gain. He or she should also think about what is over for everyone as a result of the change. Finally, the manager should develop a vision to share with the staff. Jack’s talk was the last one I was able to attend and it brought me back to the day-to-day reality of what it is like being an acquisitions manager these days. While we are absorbing much of the information presented at the conference and learning new skills (especially those in the publishing world), we still have an obligation to our staffs—whatever type of organization we serve to change masters.

Editor’s note: Please note that reports on the 1996 Charleston Conference have also appeared in the following publications—ACQNET, AALL newsletter, CRIV sheet, Choice, Library Journal, and RQ. — KS


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This colloquium, sponsored by the Faxon Institute, was actually its third conference. The second Institute meeting was held in Reston, Virginia in May 1992 and titled “Listening to Users: Case Studies in Building Electronic Communities” a follow-up theme from the inaugural conference held the year before. In April 1991, the Faxon Institute for Advanced Studies in Scholarly and Scientific Communication held its first annual conference in Reston, Virginia. The title of the conference was “Creating User Pathways to Electronic Information.” As reported in the Conference Program and General Information, “This landmark conference is a key step for the Faxon Institute in defining its mission to improve the quality and effectiveness of scholarly communication.”

The keynote speaker was Michael Schrage (author of Shared Minds, Random House, 1990 and revised as No More Teams, Currency Doubleday, 1995) who talked about how electronic tools and technologies were reshaping relationships from communication activities to collaboration processes. The irony of this pep talk about electronic collaboration and communication is that the electronic preconference did not generate the participation that was hoped for. This was through no fault of the organizers whose planning and vision was ahead of the times.

The conference itself, in a peaceful, rural setting, was a success. Schrage’s address stimulated debate over the next two days about discovering user needs, electronic libraries, creating new electronic information tools, information services for researchers, shared access options, electronic publishing, and designing the future. This was to be the first of regular annual conferences but after the next year’s, the Faxon Institute faded from sight. It did not go away.

Decades later, or so it seems in this swirling world of information technology, the 1997 Faxon Institute resurfaced...

Imagine a delicious meal shared with colleagues from all over the United States. While enjoying coffee and dessert, Stephen Jay Gould is introduced as the evening’s speaker and well into the night the audience is held spellbound while the Harvard Professor of Geology and Curator of Invertebrate Paleontology, Museum of Comparative Zoology, Cambridge, continued on page 62
discussing it, rationally and hystically at different times, that it occurred to many, at conference end, that perhaps it was time for others to get involved, scholars and academic administrators who might have a different take on the problem, not necessarily ever defined and certainly not agreed on, and who might be able to find a solution.

An especially effective component of this conference was the inclusion of all participants (press not included) on round tables. The overall quality of the discussions was high, largely due to the skills of top-notch moderators whose job it was to keep on task, subject and to allow all round table members equal opportunity to be heard. The two moderators, Robert C. Heterick, Jr. (President of EDUCOM) and Robert Siegel (host of National Public Radio's "All Things Considered"), alternated and worked with two round tables each. Heterick, of course, knows the issues and has been an influential leader in the information technology arena for many years. Siegel, a true outsider, was especially effective at asking probing questions and getting close to an equal number of responses from each person in his groups, even from some who might have been happier sitting and listening. In fact, having an intelligent, skilled interviewer from outside higher education and publishing proved to be an effective way of moving discussion along in unforced ways that those of us close to the subject would probably not do. Forced to answer the dumb, obvious, or naive question can lead to insights, if we can answer them, that don't necessarily follow from leading questions coming from our own biases and leanings, simple from our own familiarity with the territory.

The four round-table topics were: 1) Creation of Scholarly Information; 2) Distribution of Scholarly Communication; 3) Ownership of Scholarly Communication; and 4) Economics of Scholarly Communication. In discussing the creation of scholarly information, one publisher stated that publishers would not be part of the informal dissemination of information that is already taking place among scholars. Then someone asked what this web of information should be — articles linked to sources? Will scholars, librarians, and scholars have different roles in this web of information. One panelist was sure they would be different.

On ownership, one panelist said that the publisher role of the future would be editorial. Another was not sure what role publishers would play as faculty begin to create their own research and publications. Libraries and publishers will ignore this new development at their own peril.

The discussion about the economics of scholarly information elicited few comments but among them were observations about libraries taking a more business-like attitude and leveraging resources.