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## And They Were There: Reports of Meetings -- 28th Annual Charleston Conference

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He stressed the importance of engaging the faculty — in this age of digital resources, we are the guides and should let the teaching faculty know it. He suggests expanding the collection with Internet/Web resources in your library. Librarians need to have a plan; otherwise, the role of the academic librarian will be less important in the future. Libraries need to consider ways that they can offer new services.

CLIR pub-142 (8/2008) in brief: Reconfiguring Resources for the 21st century Library. The problem with the publication is that faculty does not see a need for collaborating with librarians. His slides had a list of 50+ ways to reach your teaching faculty.

Digital collections provide librarians with an opportunity to enhance the teaching process. Thematic research collections need to identify Web materials that support the curriculum. Examples are research oriented collections like: **Walt Whitman** archive and **Dickenson** electronic archive.

**Mike** stressed that one shouldn't assume that the faculty knows these sites — he advises to create digital anthologies (ex. University of North Carolina-American Southern history; Haymarket Digital collection).

The **European Digital Library** is being launched in November 2008 as the interactive **Google**.

**HaithiTrust** is a shared digital repository for Internet resources available for free — developed as a collaboration among universities. Look at and use as models.

**Comments from the audience:** Success can seem as failure if too many faculty want to have digital collections developed and not enough librarians to do it. Costs must figure out a way to balance, not in terms of dollars, but in terms of time.

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### Concurrent Sessions 2 — Thursday, November 6, 2008

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*Leading the Library During University Crisis* — Presented by  
**Frances O'Brien** (Dean, WVU Libraries,  
West Virginia University)

Reported by: **Kristine E. Mudrick** (Francis A. Drexel Library,  
Saint Joseph's University) <kmudrick@sju.edu>

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**O'Brien** provided a thoughtful presentation on a crisis that affected her university community and drew attention from the media. She provided an overview of events leading to the university president's resignation and the subsequent resignations, replacements and reassignments of several administrators and board members. **O'Brien** also described a later incident where the library was accused of preventing a student newspaper from being distributed there. The audience was cautioned not to think that situations like this can't happen to them. Noting that today's news is constantly updated and its reach is global, advice for dealing with the media during a crisis was given. Press releases serve as just one tool for making information public. The media relations department can provide employees with tips for working with the media. Challenges for the manager are many. People in leadership positions must be very visible during a crisis. Leaders must recognize that people will get information from varied sources, and that they may filter that information differently from one another. Staff may experience feelings of anger, helplessness, or need extra reassurances. After the situation quiets down, emotions may resurface. Throughout all of this, work must still get done and standards of quality maintained.

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*When Collections Merge - Impact of Space & Funding on Branch Library Collections, Services and Space* — Presented by  
**Mary Beth Thomson** (Associate Dean for Collections & Technical Services, University of Kentucky Libraries)

Reported by: **Melissa Hinton** (Long Island University,  
C.W. Post Campus) <Mellissa.Hinton@liu.edu>

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In a thorough presentation **Thomson** described the process for merging the collections and relocating three separately housed libraries. After many years at their previous locations, the **University's Chemistry/Physics Library, Geological Sciences Library, and Mathematical Sciences**

**Library** moved into the new **Science Library** that took over renovated space in the **King Building**. The two-year project began with working groups in 2006 and completion of the move is projected for the fall of 2008. Many stakeholders in the university community were identified in the process including the departmental faculty members who were accustomed to finding materials in their own departmental libraries. The merge involved the participation of many library staff members. Some international collections were relocated and other collections were weeded or put into off-site storage. Many of these decisions were based on the availability of electronic access and/or usage statistics derived from the library's online system. Members of the audience were particularly interested in the response of the various academic faculties to the merger of the collections.

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*When Collections Merge - Impact of Space & Funding on Branch Library Collections, Services and Space* — Presented by  
**Mary Beth Thomson** (Associate Dean for Collections & Technical Services, University of Kentucky Libraries)

Second Report by: **Ann Marie Miller** (SLIS Student, University of South Carolina) <annmarie.miller@gmail.com>

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This session was about how when two libraries merge, a lot of books have to fit in less space, and, the librarians are going to need to go through the books and weed out duplicate titles, and decide which books aren't being checked out often enough to keep. Redoing the shelving to fit in more books could also be a good idea. This wasn't mentioned, but, you might also increase the height of the shelves, and provide a short stool to enable more books to be fit into a smaller space. It's difficult to take books out, we all want to keep them, collections naturally grow, not shrink, and so mergers are challenging to complete. The session focused on the merger of two libraries and how the librarians had to evaluate every book and decide what to keep, what not to, and the new space saving shelves that were installed.

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*Collection Development Newbie* — Presented by **Andrea Wright** (Science Reference Librarian,  
University of South Carolina)

Reported by: **Rebecca Wright** (SLIS Student, University of South Carolina) <desertwoman53@hotmail.com>

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**A.Wright** began the session story-like. This made the atmosphere friendlier and more open. She made the session seem more informal by passing out seven questions to the audience in order to make the session feel more inclusive and active. The questions ranged from how is it that **ALA** approved LIS programs give collection development courses, yet new librarians are not ready for CD, to what's going on with the millennial generation of librarians.

**Wright** made her answers intimate and academic by providing statistics and personal experiences as a new librarian suddenly thrown into the world of collection development. For example, there are 57 **ALA** accredited programs, yet only 7 required a CD course in order to complete a Master of Library Science degree, and 4 of these programs did not even offer any type of CD course. She stated the statistics are discouraging, but as long as communication among newbie and experienced librarians, professors, patrons, vendors, allowing the newbie the freedom to fail, and knowing the mission and history of the institution are key points for the new librarian.

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*Bringing Digital Collections into the Light* — Presented by  
**Rice Majors** (Product Manager, Innovative Interfaces)

Reported by: **Meg Atkinson** (SLIS Student, University of South Carolina) <margaret.atkinson@comcast.net>

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Managing digital assets can be a challenge. The most common complaint is a lack of staff to properly manage these collections. **Majors** states that instead, we should be focusing on how we can properly utilize the staff we have. There is a need for simple tools to manage digital content

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and move the collection forward. **ContentPro** is a forth-coming product that exposes your digital collection to users on the Web and material can be added and managed easily. This product also allows an institution to differentiate their collections by addressing their different needs. Little training is required to use this Web-based interface with one step publishing. Harvesting is done in advance of the search, usually on a scheduled basis. This is not considered federated searching because it is not in real time. By harvesting in advance, **ContentPro** allows for better performance, the possibility of normalization of data, and a known metadata structure. **Encore Harvester** can promote a unified search experience of various local collections with a discovery-like platform. **Encore** is easy to manipulate and allows users to consider the kinds of resources they prefer rather than how databases are organized and what kinds of resources the library has access to. This platform also allows for community tagging. We cannot assume users are starting at our front door. Allowing metadata to be harvested by OAI-compliant aggregators increases the exposure of the collection, broadens user base, and allows aggregators to search distributed collections.

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**Patron-driven Purchasing in Ebooks** — Presented by **Kari Paulson** (President, Ebook Library); **Tom Rosenthal** (Senior Manager, Electronic Product Sales, Elsevier Science & Technology Books); **Susan Macicak** (University of Texas Libraries, Library Liaison for Linguistics, Psychology, Sociology and Human Development and Family Sciences); **Joe Wehlacz** (Information Scientist, Eli Lilly and Company)

Reported by: **Ruth Connell** (Grasselli Library, John Carrol University) <connell@jcu.edu>

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This panel presented **Ebook Library's** pay per view and purchase on demand service launched in 2000 developed in response to a request from **CERN** to find a way for quick access to materials needed by their scientists at the point of need. **EBL** developed an on-demand interface that removes the up-front selector but still allows libraries a number of options for discovery and various levels of mediation of the requests. For example, a library can put a hard limit on the price per item and can also review all other requests as they are made. The service allows pay per view for two or three times; libraries buy the item on either the third or fourth request. In 2006/2007 25% of **EBL's** revenue came from demand driven purchases and 75% from up-front buying; in 2007/08 those percentages reversed.

From the library side, on demand purchasing saves selectors' time, allows more timely access to the content, and reduces the number of purchases that are never used. Studies have shown that titles acquired through this program tend to have higher usage after purchase than those purchased up front. At **Eli Lilly**, researchers were able to get what they wanted promptly. **UT Austin** set aside an amount for this project; 63% of that money went for rental fees, about a third was used for purchases, and 5% was unspent.

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### **Vendor Usage Reports: Are we all on the same page now?**

— Presented by **Oliver Pesch** (Chief Strategist of E-Resources, EBSCO Industries Inc.); **Peter Shepherd** (Director, COUNTER); **Adam Chandler** (Information Technology Librarian, Cornell University); **Patricia Brennan** (Product Manager, Thomson Reuters).

Reported by: **Beth Hoskins** (Duke University Press) <bhoskins@dukeupress.edu>

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This session focused on the status of the **COUNTER** codes of practice and the **SUSHI** standard (Z39.9).

**Brennan** started the session by stressing librarians' trust in the validation that **COUNTER** audits provide and emphasizing the appeal of **SUSHI** for assisting librarians with downloading and consolidating usage statistics.

**Shepard** gave a report on the new requirements of **COUNTER 3**,

including the content's year of publication, reports by consortium, and the exclusion of robots/crawlers across all data. He noted that twelve publishers are currently **COUNTER** compliant for electronic books and that 79% of publishers audited are compliant for electronic journals. He questioned how the definition of "use" will affect libraries and publishers as we compare usage across these media.

**Chandler** characterized **SUSHI** as a tool for consolidating data instead of for counting usage and stressed **SUSHI's** commitment to refining robust documentation, tracking content provider implementations, and supplying a list of vendors who are **SUSHI** compliant.

**Pesch** closed by presenting slides displaying the abilities of **SUSHI** and the new requirements of **COUNTER 3**.

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**Top Ten Things to unlearn about eBooks** — Presented by **Kim Armstrong** (Assistant Director, Center for Library Initiatives); **Bob Nardini** (Group Director, Client Integration, Coutts Information Services)

Reported by: **Tony Horava** (University of Ottawa (Canada)) <thorava@uottawa.ca>

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The two speakers (the first a vendor and the second an assistant director of a consortium) engaged in a provocative point-counterpoint of myth busting with respect to eBooks. Among the top ten things to unlearn: Most print books aren't read cover to cover, so let's not be surprised that most eBooks aren't read completely either; title by title selection is not the most effective strategy for acquiring eBooks, because of the enormous overlap between schools — intelligent bulk buying is preferable; "out of print" status will not apply to eBooks; and the OPAC is not the most important discoverability tool so let's reconsider the value of MARC records. The speakers focused on high-level issues applicable to large academic institutions; their approach would have less traction for small and mid-size libraries where resources are more limited. The session reflected many of the ongoing controversies around eBooks that are not likely to go away soon! The line between myth and reality in the realm of eBooks is still a matter of much debate, as this session revealed.

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**How to Make the Most of Your Microform Collection** — Presented by **Steven A. Knowlton** (Library Holdings Consultant, UMI Division of ProQuest); **Tinker Massey** (Serials Librarian, Hunt Library, Embry-Riddle Aeronautical University)

Reported by: **Miranda Schenkel** (SLIS Student, University of South Carolina) <schenkem@mailbox.sc.edu>

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Many patrons are disinclined to use microform collections because they can be hard to find and use. They also may not seem to fit in a digital environment, but there are ways to increase their use by patrons. **Knowlton** recommended the use of digital microform scanners, since they allow more electronically-oriented patrons to use these collections; these scanners also vastly improve the image quality of the film. **Massey** suggested some improvements for enhanced access to microforms, such as creating title level MARC records for microforms to increase their visibility in a catalog, linking to online finding aids directly from a catalog, and using periodicals holdings lists that specifically indicate the scope of microform collections available. Microforms have been around since the thirties, and if libraries are to make the most of these sources, patrons need to feel more comfortable accessing and using them.

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**Opening the Doors to Collaborative Collection Development: Meeting the Janus Challenges in Florida** — Presented by **Michael A. Arthur** (Head of Acquisitions & Collection Services, University of Central Florida)

Reported by: **Heather Miller** (SUNY Albany) <h-miller@uamail.albany.edu>

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The **Janus Conference** (<http://www.library.cornell.edu/janusconference/>), held at **Cornell** in 2005, posited six challenges to the academic library community and established working groups to pursue them on a

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national level, but little has happened, perhaps because it is overwhelming on a national level. Recognizing the value of the challenges, Florida's state-wide Collection Planning Committee decided to recast them for Florida's universities and to build on Florida's history of shared activities. The Committee recast each challenge to suit the Florida situation, developing a statewide vision for resource sharing, maximizing exposure to hidden and unique collections, protecting materials and pursuing alternative channels of scholarly communication. They are pursuing centralized scanning for conversion to digital format, shared eBook collections, assigning core collection responsibility to individual institutions, building on their cooperative licensing experience, developing a shared storage facility and examining institutional repositories, open access and other alternatives to traditional scholarly communication. The speakers noted that forging cohesion on these issues is not easy, but that they benefitted from support of the directors.

**Making a Difference: Lessons Learned from CLOCKSS**

— Presented by **Heather Ruland Staines** (Global eProduct Manager, SpringerLink, Springer Science + Business Media); **Matthew Price** (Director, Marketing, American Chemical Society); **Victoria Reich** (Director, LOCKSS, Stanford University Libraries)

(Note: **Adam Chesler**, listed in early versions of the program, did not participate in this session)

Reported by: **Andrea Martin** (SLIS Student, University of South Carolina) <MARTI256@mailbox.sc.edu>

The session provided details on the purpose, structure, and history of the **CLOCKSS** global archive of digital documents. In the course of the presentation, the panel discussed the importance of digital preservation to libraries and the reasons for preserving eBooks, **CLOCKSS's** archive nodes and its use of existing infrastructure of its member institutions to cut project costs, and plans for sustaining the archive in the future. The impact **CLOCKSS** made on its successor initiative at the **American Chemical Society**, **Portico**, was analyzed.

**Monograph Collection Assessment in an Illinois Consortium: What are we buying and how is it used?** — Presented by

**Lynn Wiley** (Head of Acquisitions, University of Illinois at Urbana-Champaign); **Tina Chrzastowski** (Chemistry Librarian, University of Illinois at Urbana-Champaign)

Reported by: **Malcolm Q. Walker** (SLIS Student, University of South Carolina) <malcolmqwalker@yahoo.com>

**Wiley** and **Chrzastowski** mirrored the approach taken by **Price** and **McDonald** to examine purchased books within a consortium (*Lively Lunch Session, Thursday*). However, the data obtained was used to determine if the **CARLI** consortia was meeting the needs of its patrons. **Wiley** stated that the presentation was a preliminary showing of the results from the study. The study examined book purchases made within five years (2003-2007) using 57 of the 76 libraries in the consortia. **Chrzastowski** stated the data was examined in two phases. The first phase consisted of categorizing each record set, identifying a working set, to aggregate titles based on what was bought and how it was used, and to break titles down by subject. During the second phase **Wiley** and **Chrzastowski** will begin to normalize the publisher data, examine trade versus university presses, title overlap, and determine the number of copies purchased and how it was used as well as what is the breakout language. One limiter to the data pertained to titles in high demand, for they were unable to circulate outside of the purchasing library. This study has brought attention to the concept of

developing a collective library that shares collections, and doing this would decrease overlap as well as being cost-effective.



**WorldCat Selection: Multiple Vendors, One View** — Presented by **Joseph Hafner** (Associate Director, Collection Services, McGill University Library); **Charles F. Hillen** (Head of Acquisitions, Research Library, The Getty Research Institute); **Dianne C. Keeping** (Collection Development Librarian, Social Sciences, Queen Elizabeth II Library, Memorial University of Newfoundland); **David Whitehair, Moderator** (Global Product Manager, Cataloging & Metadata Services, OCLC)

Reported by: **Kelly Smith** (Eastern Kentucky University Libraries) <kelly.smith2@eku.edu>

**Whitehair** introduced **WorldCat Selection** (<http://www.oclc.org/selection/default.htm>), a service in which **OCLC** has partnered with materials vendors (12 at the time of the presentation, with several more to be announced soon) to streamline the selection and ordering process. Selectors can view records from multiple vendors in one system and acquisitions staff can then load MARC records into the ILS.

**Keeping** described the implementation process at the **Memorial University of Newfoundland**, the only university in the province of Newfoundland & Labrador. The university has students from 81 countries and includes four separate branches. In May 2006 they began a pilot project to use **Sirsi Unicorn's EDI** functions to receive and load electronic order and invoice records from multiple vendors. Moving away from paper helped the workflow, but with multiple staff ordering from multiple vendors, other inefficiencies remained (specifically, duplicate ordering). They implemented **WorldCat Selection** and are pleased with many of its features, particularly the following: selectors can view electronic slips from multiple vendors in one central system; selectors can view the orders of other staff, thus reducing unintentional order duplication; and it eliminates the need for acquisitions staff to rekey and import records from multiple sources. They are still working to develop a "functional acquisitions workflow" and to train all affected staff to use the **WorldCat Selection** system.

**Hafner**, outlined their experience with the product. He described the following benefits: one place to see all slips; reduction of keying in from paper slips; ability to choose hotlinks to search other databases; no manual creation of order records; availability of MARC records; and the ability to see in **OCLC** if a copy of a particular title is owned already. They are also still working on workflow issues and have plans to analyze whether the process really has saved time and money.

**Hillen** discussed the impact of **WorldCat Selection** at his library. Given the special nature of the **Getty's** collections (no date or language restrictions, 12 approval plans, and esoteric firm order scholar/researcher requests), they are looking for any products that streamline their workflow. So far, they report being happy to have a single online interface for participating vendors (not all of their vendors are participating yet) and they enjoy the "supportive features such as keyword distribution, deferred reasons, exchange of slips between reviews, easy selection, etc."

During the question & answer session, the presenters discussed the fact that the quality and amount of information on the electronic slips varies depending on vendor and they commented that **WorldCat** information is linked to enhance the vendor information. They explained the "on demand option" in which selectors can remove titles that are already owned from inbox.

They were asked about keyword profiling, particularly for foreign language words. The keyword profiling needs to be somewhat precise — subject headings work well and certain words can be marked for exclusion in order to gain more precision.

The only negative mentioned is that currently there's not a way to send slips to faculty for review. **OCLC** is working on email functionality as a future enhancement. In the meantime, you can create a list in *worldcat.org* to send to them, but this obviously requires extra effort.

**Why Not Publish Data Alongside Analysis?** — Presented by **Toby Green** (Head of Publishing, OECD)

Reported by: **Charles Watkinson** (Director of Publications, ASCSA) <cwatkinson@ascsa.org>

**OECD Publishing** packages critical economic data in forms that are useful for policymakers and has been experimenting for

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years with ways of linking its interpretative publications to the live data sources being compiled by its researchers. A recent project to relaunch **SourceOECD** as the **OECD iLibrary** has permitted even greater integration. This project is interesting for a wider group of librarians and publishers because it shows how “supplementary” materials (i.e., not only the data sets used by **OECD**, but potentially audio, video, and other complex objects) are rapidly becoming “integral” as the networked environment evolves. **OECD** has the institutional commitment and resources to innovate in this area, and is developing standards. Although the presentation was focused on the **OECD’s** own products, time was left for discussion. Describing datasets as “scholarly publishing’s lost sheep,” the speaker asked the audience of 40 librarians how many were cataloguing datasets in their OPACs (only one or two were). Recognizing the relative invisibility of data publishing, even on **Google**, **OECD** is now supplying “sheepdogs” to help catalogue and reveal data. For example, **iLibrary** will feature MARC and ONIX records for datasets and can generate Endnote-compatible ways of citing data. A white paper on “Publishing Standards for Datasets” will soon be available on the **OECD** Website, and it is working with **CrossRef** on citation standards for dynamic objects. The speaker noted there are some remaining challenges: These include electronic preservation; providing crosswalks between the 298 different source databases accessible through **iLibrary**; and the difficulties of citing the results of a search. He concluded his presentation by showing the extraordinary advances in data visualization tools, such as **Many Eyes** and **Swivel**.

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**The Problem of the Common Interface** — Presented by **John Dove** (President, Credo Reference); **Robert Scott** (Head, Electronic Text Service, Columbia University Libraries)

Reported by: **Cordelia Wilson** (SLIS Student, University of South Carolina) <Wilson29209@aol.com>

**Scott** described the smooth transition to electronic format of journals and bibliography. On the other hand, reference books in electronic format have not developed as much as expected. Nevertheless, publishers and other information providers have attempted to augment the besieged traditional reference library with virtual reference libraries. **Scott** examined several of the most important ones. Each has developed its own interface making it difficult for libraries to choose content from a variety of publishers. A common interface that would be beneficial to librarians and publishers would require standardization and collaboration. Such an interface would use key **Boolean** reference tools. Usability of results would be enhanced by key word in context or quick overviews, extensive cross-referencing, and concept maps.

**Dove** discussed **Credo Reference’s** efforts to create a coherent, customizable aggregation of reference works with a responsive interface. He emphasized the role of reference librarianship in developing a product that gives guidance in context. **Dove** stressed the benefits of interconnectivity in online reference. He suggested starting small in building a common interface — perhaps with categories such as persons, places, events, works, and institutions — and showed how a wealth of interconnected information could be found using reference sources that are already available.

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**Afternoon Plenary Session — Thursday, November 6, 2008**

**Achieving Community Goals in our Decentralized Environment** — Presented by **Roger Schonfeld** (Manager of Research, Ithaka)

Reported by: **Ramune K. Kubilius** (Northwestern University, Galter Health Sciences Library) <r-kubilius@northwestern.edu>

**Schonfeld** reminded attendees that funding is not centralized in the United States, resulting in a competitive higher education system at all levels, presenting achievements and challenges. Some traditional and digitally possible shared community goals he covered:

- 1) Improve access to higher education with the goal of distributing educational materials more broadly to reach new communities of learners. India’s centralized achievements may not be possible, but look to individual institutions’ models in this area;

- 2) Maximize the impact of the research output. ILL and “borrow direct” are advancements, but increase accessibility to scholarly research by using low price or open publishing platforms. An Ithaka 2006 faculty survey indicated the reasons why it is very important where one is published — to be widely read in the field, no cost to publish, preservation of publications, etc.

- 3) Preserving information necessary for scholarship. Traditionally that meant to purchase, retain, and store on campus, and now license key collection of interest and part in economically sustainable digital preservation solutions, hoping sufficient print collections are retained somewhere (else).

Audience questions and comments ranged about outsourcing to a 3rd party the responsibility, community-friendly collaboration, a services model, with different sets of incentives, the impact of “mission creep” of institutions (former Quaker become liberal arts institutions, etc.)

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**Morning Plenary Sessions — Friday, November 7, 2008**

**How Not to Read a Million Books** — Presented by **John Unsworth** (Dean, School of Information & Library Science, University of Illinois)

Reported by: **Ramune K. Kubilius** (Northwestern University, Galter Health Sciences Library) <r-kubilius@northwestern.edu>

**Unsworth** began with the reading of *The Spectacles* (1905, C. Morgenstern) but concentrated largely on the **MONK** project, *monkproject.org*, due to be completed a few months after the conference. Containing 1,200 humanities works, the project is a treasure trove for text mining. It can help researchers analyze literature, look for patterns, describe characteristics of a literary movement. **Unsworth** illustrated his presentation with cases of a few dissertation research studies for which the project was a boon. Examples: Frequent pattern analyses (visual cluster panels) in **G. Stein’s** *The Making of America*. Social, literary and legal meanings of witchcraft analyzed in *The Gentleman Devil*. Sentimentalism in **Dickens**. Words **Jane Austen** avoided. Words used by male and female authors. Over-represented words in Victorian deathbed scenes. These studies use world clouds, and search engines just cannot do this type of work. Best practices of text mining in the humanities include:

- 1) Report all data available;
- 2) Methods should be reproducible;
- 3) Report failures;
- 4) Don’t over-interpret the significance of statistical results.

Q&A/comments from the audience included an observation that the application of statistics to human phenomena is useful. Whose job is it to build the research corpora? (Researchers, and OA, if possible). Software? (Nature language processing and toolkits. **SEASR** is an example of text-mining software.)

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**The Second Life of “Hectic” Pace: Embracing the Network** — Presented by **Andrew Pace** (Executive Director, Networked Library Services, OCLC)

Reported by: **Ramune K. Kubilius** (Northwestern University, Galter Health Sciences Library) <r-kubilius@northwestern.edu>

**Pace’s** career path included epiphanies and milestones on the way to **OCLC**. His professional start was in 1994, the 30th anniversary of the MARC record, the first Macintosh, etc. There are advocates, practitioners, and practical advocates in between. “Embrace your inner silo.” Librarians build basements, but it’s hard to build bridges there. Look to industry: **Amazon** spends 70% on infrastructure, 30% of time is spent on what moves the company forward; **UPS** has supply-chain software, **eBay** has online “stores.” Web 2.0, per **Tim O’Reilly**, is about diffusion: who owns, controls, and gives best access to data. **Lorcan Dempsey** writes about gravitational attraction, etc. Look to consortia, shared discovery layers, the ERM knowledgebase (print and licensed inventory management). Diffuse the library into space (users don’t have to come to libraries). Aiming low: the OPAC; aiming high: Webscale. **Pace’s** plan for **OCLC**? Make it a compelling user environment, consider its relevance in the global arena. More should happen in the cloud. Consider staff workflows: librarians

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shouldn't continue their martyr complex, just so users are happy. Libraries should be visible on the Web, with financial savings on the cost of ownership. Emphasize basic functionality on the network at Webscale. Create for immediate use, and expose the potential for the future.

**Bibliographic Control and the Library of Congress** — Presented by **Deanna Marcum** (Associate Librarian for Library Services, Library of Congress)

Reported by: **Heather Miller** (SUNY Albany) <h-miller@uamail.albany.edu>

**Marcum** based her remarks on the *Report of the Working Group on the Future of Bibliographic Control* (<http://www.loc.gov/bibliographic-future/>). Recommendation included devoting more effort to LC's special collections and unique materials, sharing the production of records for more widely held materials and finding new ways to collaborate and broaden LC's reach to the user. She noted the controversial recommendation to suspend work on RDA (the cataloging code expected to replace AACRII) which is now being tested by LC and others. Answering questions, she stated that LC is by practice the national library, but by statute it is not. At LC, the focus has been on creating records that other institutions will use. LC's own collections number *ca.* 138 million items for which there are *ca.* 30 million records. She is concerned about non-English language collections (450 languages) which form 60% of the collection. Regarding a perceived decline in cataloging quality, she stated that it is not proper for LC to be defined by just one activity. She is most concerned about sufficient access points. The **Program for Cooperative Cataloging (PCC)** is looking at ways to broaden its base and assure that records are created for all new publications. Enough institutions can contribute cataloging to enable PCC to broaden its base without negative impact on small libraries. She noted that a team of technical experts is looking at the possibility of extracting data from finding aids in order to catalog create records, looking first at music, rare books and the Asian Division.

**Anti-Social Cataloging News: Is Everything Changing?** — Presented by **Heidi Hoerman** (Instructor, School of Library and Information Science University of South Carolina)

(Originally scheduled title: *What is Social Cataloging and Where Is It Going?*; The originally scheduled speaker: **Tim Spalding** (Founder and Lead Developer, LibraryThing), ran into travel problems so **Heidi Hoerman** offered to present on the topic entitled in bold. — **RKK**)

Reported by: **Heather Miller** (SUNY Albany)  
<h-miller@uamail.albany.edu>

**Hoerman** focused on what is changing (or not) re cataloging, noting that wide use of the MARC tagged bibliographic record for each unique item supports record sharing via **OCLC**. All the players are on the same page. FRBR and RDA are new concepts. With FRBR, the work has an emanation, manifestations and items, constituting a complete change in

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the structure of bibliographic records. Any given physical item would have several records, intended to serve all purposes. Defining "work" has proven difficult and is not settled. RDA, based on FRBR, is intended to replace AACRII and assumes universal machine to machine cross communication and translation, replacing the linear MARC record with XML. Unfortunately, the focus has been on content, not coding. Given conflicting goals for RDA, lack of general agreement and funding, lack of testing and assessment, **Hoerman** concluded that we will use AACRII for this decade and maybe the next and we will need to maintain AACRII. She believes that the FRBR/RDA goals will be realized eventually. She urged catalogers to continue working toward determining what is useful, possible and practical. During the Q&A period, **Deanna Marcum** stated that LC is serious about testing RDA. Others noted the potential for RDA to be useful to publishers and rights organizations and the value of interoperability overall.

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**The Role of the Library in a Fully Googlized World** — Presented by **Nancy Eaton** (Dean of University Libraries, The Pennsylvania State University); **Joyce Ogburn** (University Librarian and Director, J. Willard Marriott Library, University of Utah); **Rick Luce** (Vice Provost and Director of Libraries, Emory University); **Rick Anderson, Moderator** (Associate Director for Scholarly Resources & Collections, University of Utah)

Reported by: **Kelly Smith** (Eastern Kentucky University Libraries) <kelly.smith2@eku.edu>

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Moderator **Anderson**, introduced the scenario being tackled by three library administrators in this presentation: “It’s the year 2020. **Google** has digitized effectively all of the books, journals, and newspapers in the major research libraries of the Western world, and has improved its search engine to such a degree that all the content is easily searchable and any user can find any book, chapter, or article she wishes in seconds. Furthermore, **Google** has entered into agreements with all affected publishers that make it possible for anyone to view and download up to 30 pages of any book or journal issue for free, and purchase additional pages at half a cent per page. Currently-enrolled students and faculty from kindergarten through graduate school get unlimited free access, underwritten by advertising. Question: What does the library do now?”

**Ogburn**, in her segment of the presentation, entitled “2020: Remembering a Decade of Change,” envisioned a detailed timeline of events, characterized by a move from collection to creation and increasing collaboration. A few of her interesting extrapolations included: **OCLC WorldCat** transforming to a wiki model in which content is added by publishers and librarians; an independent peer review board, managed by scholars and librarians, develops a peer review symbol to identify peer reviewed scholarship online; openness becomes predominant strategy for scholars as “the **Napster** generation” graduates from graduate school and brings the same approach to scholarly communication; traditional entertainment outlets decline under a controlled access model as purchased products lose popularity to open access products; new open access scholarship surpasses new controlled access, and Libraries directly manage only a percentage, but foster much of it. She concluded that as humans we desire to explore, learn, express, create, perform, record, and share our creativity and discoveries. This unquenchable desire leads people to reinvent methods and systems to make these things happen and to knock down barriers that get in the way.

**Luce** was less specific in his presentation. He described the impact of the economic downturn together with sea change of baby boomer retirements on libraries, resulting in the need for more cooperation and spreading work across libraries, with the number of libraries decreasing as each becomes more focused and specialized. In this model, libraries band together to resist individual licensing and special collections go through a renaissance. He described Librarians as “middleware,” hosting collective laboratories and data repositories.

**Eaton** gave a presentation entitled, “The Next Generation Library: A Scenario.” According to **Eaton**, the recent **Google** settlement opens the doors to this kind of scenario. In the **Google** age, readers are also writers and opinion pushers. Is a primary focus on text enough in a world of multimedia? We need to stop thinking of books as the product at the end of a chain. **Eaton** cited **Christine Borgman’s** article in the November/December issue of *EDUCAUSE review* (<http://net.educause.edu/ir/library/pdf/ERM0863.PDF>). According to **Eaton**, **Bergman** maintains that data mining is more important in this new environment than content. As long as libraries are repositories, we limit our future. Library functions must move to the network level to survive — the challenge is to tease out what can be accomplished at each level. At the Network level are cooperative cataloging, search and discovery (**Google**), access to remote collections, and eScience. At the Regional level are shared digital repositories and preservation, supercomputing centers, and Internet nodes. At the local level are “library as place” issues. It is urgent that we review library workflow and replace local online catalogs with networked models such as **OCLC Local** and that we get **Google** search results to link to local library content.

During the question and answer session, panelists were asked to address how this vision of the future requires employees with substantially

different talents than existing staff. Will there be people to do it? Where will it be found? How will they be paid? The panelists didn’t really have practical answers to the questions other than to reiterate that we need more specialized and advanced staff.

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### Lively Lunches — Friday, November 7, 2008

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**Education in Publishing** — Presented by **Heidi Hoerman** (School of Information and Library Science, University of South Carolina)

Reported by: **Brett Barrie** (SLIS Student, University of South Carolina) <BARRIE@mailbox.sc.edu>

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**Hoerman** began the session by discussing the lack of formal publishing degrees amongst colleges and universities. She attributed this to publishing being an “accidental” profession. Often times, if classes are offered for publishers they count towards ad hoc certificates and not standalone degrees and are taught largely by adjunct faculty. These certificates may be offered through different schools, varying their curricula to suit the diverse disciplines represented by publishers. As it stands now, formal education among publishers remains optional. Many students attending these classes are already established in the field.

The audience, consisting almost entirely of publishers, quickly reached consensus. They agreed that the majority of those entering the field of publishing do so through an apprenticeship, rather than through a university. One audience member did suggest, however, that he gravitated toward pools of students because it was easier to locate the recruits. Most agreed that the current state of formal education was adequate, though some were interested in the possibilities of such an education. Continuing education and knowledge of the subject matter published are desirable currently, although they speculated that immediate knowledge of publishing itself may improve the quality of published material.

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**Changing Change to Make a Change!** — Presented by **Tinker Massey** (Serials Librarian, Embry-Riddle Aeronautical University)

Reported by: **Karla Chavois** (SLIS Student, University of South Carolina) <selahcat33@gmail.com>

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Change may be the only constant, but it doesn’t have to rule your life. So don’t let it. This was the core message during this **Lively Lunch**. Moderator **Massey** asked session participants to discuss examples of the daily stresses experienced in their work environments, the session leader then giving specific examples of how communication and evaluation can help constructively change those situations. The moderator was comfortable enough to share her own personal and poignant experiences of handling major personal and professional life changes, ones she still manages to this day. These real-life examples truly brought home the point, the potential, and the necessity of the class. A self-analysis chart of goals, their pros and cons, and an action agenda was interactively performed and a copy distributed as a helpful reminder for future endeavors. This class could be very formal or informal in tone, but this year’s session was engaging and inspiring, full of informative and helpful advice. Change will come, but your attitude, coping skills and preparedness will determine your reaction to its inevitable approach.

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**Publishing as Community** — Presented by **Judy Luther** (President, Informed Strategies), **Robert McNamee** (Director, Electronic Enlightenment Project, Bodleian Library, University of Oxford), **Mary Rose Muccie** (Project Muse Johns Hopkins University Press)

Reported by: **Rebecca Wright** (SLIS Student, University of South Carolina) <desertwoman53@hotmail.com>

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This panel consisted of three professionals; the focus of this discussion was on viewing publishing as community. This out of the box panel was

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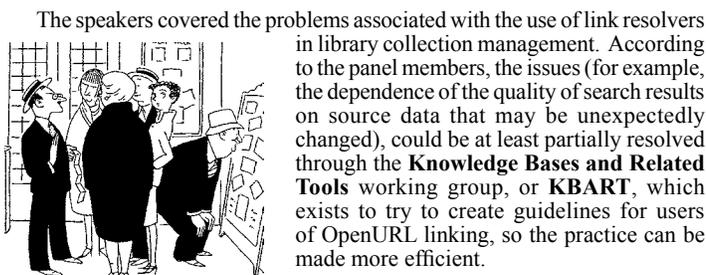
## And They Were There from page 76

easy going and produced a lot of ideas in the area of publishing. For example, **Luther** stated that focusing and placing emphasis on the community around publishing takes some getting use to, but it is needed because without support from the community then it will be useless to publish. This is why organizing a grassroots campaign is very important.

The idea of an extended community online with discussion forums with multiple people monitoring it was produced and this prompted the discussion about “coffee house” forums called SNUBS (small personal spaces) and the **Rose** project (the digitization of **Le Main de la Rose**) and how networking is important as well as maintaining manuscripts. Building a community around a series of pre-digital exchange using Web and digitalization of certain texts is key as well as proper dialogue in order to publish as community.

**OpenURL Linking: Crisis? What Crisis?** — Presented by **Adam Chandler, Moderator** (Coordinator, Service Design Group, Digital Library and Information Technologies, Cornell University), **Nettie Lagace** (SFX/Verde Product Director, Ex Libris Group), **Oliver Pesch** (Chief Strategist of E-Reources, EBSCO Industries), and **Bruce Heterick** (Director of Library Relations, JSTOR)

Reported by: **Andrea Martin** (SLIS Student, University of South Carolina) <MARTI256@mailbox.sc.edu>



The speakers covered the problems associated with the use of link resolvers in library collection management. According to the panel members, the issues (for example, the dependence of the quality of search results on source data that may be unexpectedly changed), could be at least partially resolved through the **Knowledge Bases and Related Tools** working group, or **KBART**, which exists to try to create guidelines for users of OpenURL linking, so the practice can be made more efficient.

**Learning Together: Vendors and Libraries Creating Better Processes to Improve Services** — Presented by **Mildred Jackson** (Associate Dean for Collections, The University of Alabama), **Beth Holley** (Head of Acquisitions, University of Alabama), **Janet Lee-Smeltzer** (Head of Cataloging & Metadata Services, University of Alabama), **Robin Champieux** (Library Partnership Manager, Blackwell)

Reported by: **Malcolm Q. Walker** (SLIS Student, University of South Carolina) <malcolmqwalker@yahoo.com>

This particular presentation dealt the collaboration between the **University of Alabama Libraries** and **Blackwell**. **Jackson** noted that her task was to implement ways to improve patron and service efficiency. Steps taken were to restructure the work flow Acquisitions and Cataloging, yet more was done to address the costs. In particular funds were spent using **OCLC**; however, multiple features were not utilized. In short, the goals were to increase efficiency, improve ordering process, and to move the library forward. **Champieux** explained that **Blackwell's** directive is to “define the present in order to identify opportunities for change and how to meets goals.” **Holley** commented on the changes in Acquisitions citing that paper order requests have been eliminated. In its place a one title order request was implemented — but that this form of ordering had been superseded by a multi-line form. Likewise, **Lee-Smeltzer** commented on the changes in Cataloging. Some of the changes consisted of improving the consistency of cataloging practices. Also to assign tasks that met a staff member's level of expertise. To conclude, this presentation presented an interesting insight on how vendors can aid a library unit in reforming its work flow to better serve its patrons. 🌿

*That's all the reports we have room for in this issue, but we do have more reports from the 2008 Charleston Conference. Watch for them in upcoming issues of **Against the Grain**. You may also visit the **Charleston Conference Website** at [www.katina.info/conference](http://www.katina.info/conference) for additional details and to view a PDF file of the remaining reports which have not been published in print yet. — KS*

## Standards Column — Moving Libraries to a Web Services Environment — Issues To Consider

by **Todd Carpenter** (Managing Director, NISO, One North Charles Street, Suite 1905, Baltimore, MD 21201; Phone: 301-654-2512; Fax: 410-685-5278) <[tcarpenter@niso.org](mailto:tcarpenter@niso.org)> [www.niso.org](http://www.niso.org)

In April, **OCLC** released the first iteration of a Web-based service for library management systems. This is the first salvo in what will likely become a radical transformation on how libraries manage their resources — both in print and digital forms — as well as their services. Much like many industries that are moving to hosted or “cloud”-based solutions, libraries are assessing the practicality of running their own complicated back-end office systems, their integrated Web-based user applications, all their discovery tools and the ever growing multitude of information management environments.

### What is a Web Services Environment?

In this environment, an organization uses a third party service and their networked information resources to provide information technology, software and services, rather than owning and running all the services in-house. Industry has been moving in this direction for some time, generally referring to such vendors

as application services providers (ASPs). A simple example is a Web-based document creation tool such as **Google Docs** that is used to replace desktop word processing systems.

One service that is frequently cited as an example of cloud-based services is **salesforce.com**. Organizations that rely heavily on sales teams, who are frequently on the road, need centralized contact and customer relation management (CRM) software that is accessible from anywhere the sales rep happens to be. They have been turning to this service to provide it since it was launched in 1999. Lest one think that Web-based applications are a niche market in software, **salesforce.com** saw its 2008 revenues top \$1 billion. Beyond sales management, other popular management systems in a Web environment are accounting — **NISO**, for example uses **QuickBooks Online** — Gmail to replace enterprise email systems, **Skype** or **Vonage** for telephony, or even **Amazon's Elastic Compute Cloud** that provides processing capacity.

The benefits of using a remote, Web-based platform for information services can be tremendous. The company no longer has to purchase and manage costly servers and networking technologies or address the significant technical issues with controlling access or security, and applying the frequent and necessary software updates and hardware upgrades. Training costs for IT staff to stay current in an ever-changing field can be reduced or eliminated. New capabilities may be available faster as the customer base and competition can drive the supplier to implement new capabilities sooner than an organization might do so in-house.

### OCLC's Plans for a Web Environment Library Service Structure

For many years, people have seen the potential of applying the principles of Web computing to library management systems. **Andrew Pace**, formerly at **North Carolina**

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