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

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I Hear the Train A Comin’
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infrastructure (to house and distribute physical objects) to managing services (applied to digital objects), which are largely provided by infrastructure offered externally. Libraries are no longer judged by the size of the library or the number of print volumes they hold. Rather, they are assessed on the quality of the services they provide to connect their constituents to the right information when they need it. Kevin stressed that the key to succeeding in this new environment is nailing the services where the library (or the press, or any other local actor) has a unique advantage. He cited IBM as a possible case study, which has managed to transform a good part of its business from being capital goods driven (selling computers, especially mainframes) to becoming a business services provider. IBM is now a problem solver using technology, with more than 50% of their revenues derived from services. Libraries would be well-served to look at Big Blue as a model for transitioning their core business. The successful libraries will be the ones that develop and adapt their services, models, and approaches to further the goals of both their local institutions and the scholarly communication space globally.

As a quick editorial aside, I must commend not only Douglas Armato and Kevin Guthrie, but also the audience at the Train-LIVE session. All parties brought their “A” games, and the result was a lively and free-wheeling plenary that gave us an interesting peek at the challenges and opportunities our industry faces in this rapidly changing environment. 🗣
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**The E-book Challenge: From Start to Finish, and Beyond** — Presented by David Hellman (Collection Development Coordinator, San Francisco State University); Ya Wang (Electronic Collections Coordinator, SFSU); Jay Henry (Director, Business Development, Blackwell Book Services)

Reported by: **Christine Ross** (University of Illinois at Springfield) <cmross1@uis.edu>

This presentation offered San Francisco State’s E-Book Acquisition Project as an example of steps and possible pitfalls that other libraries may want to follow and avoid when embarking upon their own eBook acquisition endeavor. The first speaker laid the groundwork as to why the college decided to start purchasing eBooks. Then the presentation became much more subjective and less informative as each of the technical steps, specific to this college’s ILS, were outlined in meticulous detail. The presentation wrapped up with a nice discussion of specific steps and possible pitfalls that other libraries may want to follow and avoid when embarking upon their own eBook acquisition project.

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**The Role of More Accurate Acquisitions Data in the Shift from Print to Digital Format** — Presented by Sarah Pomerantz (Acquisitions Librarian, Adelphi University); Andrew White (Associate Dean, Adelphi University)

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

Adelphi University is a medium-sized, liberal arts institution in Garden City, NJ with three satellite campuses. There are libraries at all four sites, nearly 650,000 volumes, 805 microforms, 27,000 AV materials, over 30,000 electronic journal titles, and 165 databases.

Digital preservation is not simply reformatting from print to digital or providing byte storage to back up print resources. It is necessary to think beyond current practices because long-term success of digital preservation will require cooperation in order to assure enduring content that has discoverability, authenticity, usability, and accessibility.

Who will be involved?

Will international collaboration be needed (or possible) to address the growing digital preservation challenge? We are saving the output of our own country on Websites but we are losing access to other valuable collections, particularly statistics. The Library of Congress has established exchange programs with foreign countries in order to obtain publications but time zone differences, international calls, transfer of monies, etc. make it hard to share funding resources.

How will preservation activities be organized and distributed?

How can preservation work be distributed? What preservation work must be done locally? Which preservation tasks can be distributed? Concrete proposals will be put on the table to discuss the subject and will focus on layers — the standards, the content space, and the problems involved in keeping it together. No one has the answer at this point. What are the key digital preservation challenges and opportunities that face publishers, libraries, and archives as we look ahead 5, 10, 50 years?
When Pomerantz began her position at AU, she noticed that since the Acquisitions structure had been created quite a few years before, there had been a shift in information formats from print to electronic. Among other things, there was quite a bit of redundancy present in the old form types and there was a lack of consistent placement for digital materials within the old fund accounts. Pomerantz realized that there needed to be a complete overhaul of the Acquisitions module and took her recommendations to White. The importance of accurate financial data is to have knowledge of available funds, being able to track encumbrances, and to anticipate annual expenses for renewals. Accurate data provides financial statistics, budget management, and accountability and justification. All fund codes had to be collapsed and then blown back out so that they would not only correspond to the new library fund accounts, but with university accounts as well. Under the new structure, acquisition data has improved with clearly defined fund account codes, subscriptions are encumbered, digital collection resources are paid in acquisitions, and codes now exist for digital resources. Future considerations for this project are reporting with proper assignment of HEGIS codes, prediction of FY needs based on annual renewal costs, and a shift in funds from firm orders to digital renewals for eBook access models.

### A Far, Far Better Place: Adapting to Change in Technical Services

*Presented by Laura Kinner (Director of Technical Services, The University of Toledo); Alice Crosetto (Coordinator, Collection Development, University of Toledo); Lucy Duhon (Coordinator of Electronic Resources/Serials Librarian, University of Toledo)*

Reported by: [Katherine L. Latal](mailto:KLatal@uamail.albany.edu)

The three presenters used clever illustrations to the delight of the attendees who filled the room beyond capacity. According to Crosetto, technical services experienced the worst of times in recent years due to staff and budget reductions, coupled with increasingly complex work, technological changes, and a more team-focused, less hierarchical environment. Recognize that staff may reflect characteristics unique to their generation: Silent Generation, Baby Boomer, Generation X, and Millenial. As Duhon noted, technical services face the dual challenge of an aging workforce and changing technology. Know your staff in order to use their talents and abilities wisely and to move and retrain staff. Libraries must provide current content to keep the library relevant to its educated, mobile, and diverse users. Technical services must innovate and take part in the ongoing changes, advocate for the library, listen to younger staff and incorporate the wisdom of seasoned employees, collect input from users and be visible. Kinner recommended planning for the future: involve all groups; create a time line; require mutual respect; let all be heard; include and be visible. Incorporate the wisdom of seasoned employees, collect input from users in the ongoing changes, advocate for the library, listen to younger staff and mobile, and diverse users. Technical services must innovate and take part in the ongoing changes, advocate for the library, listen to younger staff and incorporate the wisdom of seasoned employees, collect input from users and be visible. Kinner recommended planning for the future: involve all groups; create a time line; require mutual respect; let all be heard; include and be visible.

### New Platforms for Delivering and Distributing Content

*Presented by Linda Vendryes (VP, Channel Development, Ingram Digital)*

(The originally scheduled speaker was Rich Rosy, VP & GM, Institutional Solutions, Ingram Digital)

Reported by: [Cathy Green](mailto:greencn@mailbox.sc.edu)

Librarians have several options for getting content, across a variety of providers and platforms. Vendryes identified six options, with an analysis of their strengths and weaknesses. Publisher direct can offer the best price, brand and subject coverage but with limited content and need to buy all for the best price. Journal aggregators have a single point of entry, strong metadata and the biggest bang for the buck. Distributors provide physical and electronic access and acquisition, with standing orders, but can be focused on print delivery. eBook aggregators present a single search platform with multiple publishers, flexible pricing and limited subject access. Federated search tools can be tough to implement successfully, with great theory but poor execution and technical limitations. Search engines have good name recognition and wide acceptance, with endless search both a plus and minus, and the issue of providing a democratic search interface vs. accommodating smart users. Vendryes concluded with a discussion of library and publisher trends, including expansion of user access and offerings (while not expanding shelf space), more flexible pricing models, eBook support for user annotations, and the effect of digital rights management (DRM) techniques like flow control on access.

### Plenary Session — Friday, November 7, 2008

**OA Exposed!** — Presented by Arend Kuester, Moderator (Director, PCG Europe); Ralf Schimmer (Head of the Department of Scientific Information, Max Planck Digital Library); Richard Luce (Emory University); Win van der Stelt (Executive Vice President Business Development, Springer); David Hoole (Head of Brand Marketing and Content Licensing, Nature Publishing Group)

(Substitute speaker: Charles “Chuck” Eckman (Associate University Librarian & Director of Collections, University of California—Berkeley attended instead of Ralf Schimmer))

Reported by: [Anna Fleming](mailto:a-fleming@northwestern.edu)

Moderator Kuester began by reading comments from Schimmer who could not attend and urged publishers to look at OA as an opportunity and not to fear the financial impact. Eckman talked about Berkeley’s BRII (Berkeley Research Impact Initiative) pilot project co-sponsored by UC Berkeley’s Vice Chancellor for Research and the University Librarian. BRII variably subsidizes author fees toward OA publications to support campus researchers who want to make their journal articles free to all readers immediately upon publication. Eckman considers such support in line with libraries’ public service mission. Hoole reported that NPG is exploring ways to make archiving automatic for its authors and wondered if scholars could get the benefits of text-mining from pre-pubs. He also thought that the business of publishing cannot be ignored. Luce called for support of experiments like SCOAP3 (Sponsoring Consortium for Open Access Publishing in Particle Physics), which supports OA publishing in high-energy physics. Van der Stelt thought libraries can and ought to do more to help authors self-archive. He also offered that Springer acquired BioMed Central to support OA in the life sciences with a proven venture. Q&A was lively, including a question about whether all published research might become freely available eventually. Publishers in the room said no—that the editorial process in particular adds value to the research.

### Sessions — Saturday, November 8, 2008

**Genius at Work: Top 10 Ideas I Heard (and can copy) at the 28th Annual Charleston Conference** — Presented by Tony Ferguson (University Librarian, University of Hong Kong)

Reported by: [Ramune K. KUBLIUS](mailto:rkublius@northwestern.edu)

Ferguson shared 2008 conference “cool bits of information” and “ideas to copy” that resonated with the audience (those not in Charleston may miss the context). On his “cool” list: The staff will change…(Push, pull them, or are they wet noodles?). Insert “2.0” in as many sentences as possible. When in doubt, practice “digital overlap therapy.” Software, policies, etc. aren’t “user-friendly” when people need training to use them. American libraries have finally decided that eBooks will work. Scholars’ communication seems to be reaching the tipping point, sufficient to make a difference in tenure decisions (a foundation for what libraries are doing). Microsoft is moving software into the “cloud,” while OCLC plans to move OPAC software there… On Ferguson’s “copy ideas” list: Overseas-based folks can use work-around solutions to purchase books online (amazon.com U.S. dollar gift certificates). Employ case studies using primary source materials to teach research skills in news and other sources. “Resources aren’t postage stamps,” so “drag people through them.” Post-Google agreement: rethink ILL, remote storage. Brainstorm how to regain the trust of students and faculty. Stop about materials, start teaching textual critical thinking skills. Participate in Elsevier’s (funded) ROI study. Promote the single box search option. Today’s students prize informality and “almost is good enough”…

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Converging on Persistence: Steps to an Ecology of Long-Lived Collections — Presented by Brian E. C. Schottlaender (The Audrey Geisel University Librarian, University of California San Diego)

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

Collections are more and more about what an individual library owns (as opposed to what can be accessed). Thus, preservation is imperative; it is also complex, based as it is on trust. Schottlaender noted that OCLC’s Lorcan Dempsey’s focus is on collective, system-wide perspectives and the Association of Research Libraries emphasizes strong preservation programs. Schottlaender focused on shared facilities, distinguishing between shared repositories and shared collections. In the latter, all decisions are collective. The University of California shared collection is a shared distributed collection in which ownership remains with the library while the collection is collectively managed. Trust becomes more complex in varied shared environments such as these and should be formalized in written agreements. He noted also that of the 68 shared high density library storage facilities in North America only 14 are shared and pointed to the Center for Research Libraries as the “grandaddy” of cooperative, shared storage which expanded to shared acquisitions, cataloging and delivery as well. He referred listeners to Michele Cloonan’s article “The Moral Imperative to Preserve,” Library Trends (Winter 2007) and Amy Friedlander’s “Averting a Digital Katrina: Sustaining Trust in the Research Infrastructure,” Educause Review (July/Aug. 2008).

Introduction for Innovation Sessions — Presented by JoAnne Sparks (Assistant Director for Research and Learning Services, Bodleian Library, University of Oxford)

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

In 2007 Sparks shared examples of innovative measures that she and colleagues had implemented at her previous place of employment at the Memorial Sloan-Kettering Cancer Center in New York City. Recently transplanted to the U.K., for the “second annual” Charleston Conference “Saturday morning of innovation” in 2008, Sparks began her short introductory comments by sharing various definitions of innovation: describing something realized anew; a rediscovery applied in her short introductory comments by sharing various definitions of innovation: describing something realized anew; a rediscovery applied in her short introductory comments by sharing various definitions of innovation: describing something realized anew; a rediscovery applied in her short introductory comments by sharing various definitions of innovation: describing something realized anew; a rediscovery applied in her short introductory comments by sharing various definitions of innovation: describing something realized anew; a rediscovery applied in her short introductory comments by sharing various definitions of innovation: describing something realized anew; a rediscovery applied in her short introductory comments by sharing various definitions of innovation: describing something realized anew; 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Innovation Session 1 — Saturday, November 8, 2008

Academic Libraries without Print — Presented by Allen McKiel (Dean of Library and Media Services, Western Oregon University); Carol Zsulya (Head of Access and Distant Library Services, Cleveland State University); Jim Dooley (Head, Collection Services, University of California, Merced); Robert Murdock (Assistant University Librarian for Collection Development & Technical Services, Brigham Young University)

Reported by: Ryan Weir (University Libraries, Murray State University) <ryan.weir@murraystate.edu>

Imagine a library without print resources. What would such a library look like and how would it function? During the forty minute session, three innovative leaders spoke about their libraries. Dooley discussed his library where the idea of the computer lab has been scrapped for a collection of 250 laptops that are available for checkout, and 90% of their resources are only in electronic format. Murdock spoke about his library’s move from a collection comprised of mainly print materials to one that now includes online journals, databases, e-books, and print on demand journal services. Zsulya shared her library’s experiences as they started moving their collection to online formats in early 2001. Between 2001 and 2007, her library has moved from spending 37% of their budget on online resources to 67%. This presentation provided guidance and perspective for the national trend of academic libraries moving towards offering more online content. This session offered insight into three different libraries at three different stages of this process, as well as, practical information and ideas, to help get your library further along the path to a larger electronic collection.

The Evolution of Service: A Technical Services Perspective — Presented by Helen Heinrich (Cataloging Coordinator, California State University, Northridge); Donna LaFollette (Accounting & Receiving Supervisor, California State University, Northridge)

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

Faced with the problem of shrinking technical services resources, the Cataloging Coordinator at Oviatt Library at CSUN had to decide how to balance user expectations with the price of service. Changes in the workflow were needed and Heinrich implemented five components to make it happen: review, revise, reorganize, technology, and collaboration. In the review process, staff members were interviewed, there was an internal and external review, and a cost analysis was completed. Procedures were then revised to reduce duplication and eliminate unnecessary tasks. Quality standards were modified to reflect current reality and cross-training was provided. During reorganization functions were consolidated, communication was reinforced, and fragmentation was reduced. In the department was eliminated. Staff was encouraged to trust in their colleagues’ expertise by changing the expectation from that of a mistake to that of correctness. Leveraging technology to their advantage, they enabled cross-portal searching, automated repetitive editing, and purchased needed equipment. By collaborating with vendors, they were able to implement the open URL system needed for cross-portal searching, changed their output record profile, and began using PromptCat for automated copy-cataloging. The ongoing reorganization has had positive results thus far. They were able to “cut the fat” without sacrificing service to users.

Innovating with Purpose: Think Global, Act Local, and Then Give Back — Presented by Rachel Frick (Senior Program Officer, Institute of Museum and Library Services); Elisabeth Leonard (President, Library Solutions)

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

Frick and Leonard were innovation cheerleaders, rotating their turns to comment, sharing examples from the “real library world.” Do an environmental scan and gather what is our new context—locally and nationally, in the cyberinfrastructure. What’s changing in our favor? Our approach to assessment; librarian entrepreneurs; the glut of information, grants that call for scientists to share data and they don’t know how, new librarians with new ideas and fresh perspectives. The gardening metaphor: prepare the soil, seed the field, let the flowers bloom, realize that not every seed will germinate, feel the love. Innovation thrives when managers foster and reward it and promote risk-taking. Don’t talk only to librarians. The call to action? We need to solve problems, not offer applications. “Innovation is an investment of time, so dip your toe in.” “Manage by exception rather than by demand.” Let us “truly embed ourselves.” “Back to the bibliographer,” “Preservation mandate.”

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Innovation Session 2 — Saturday, November 8, 2008

Bridging the Google Gap — Presented by Darrell Gunter, Moderator (Chief Marketing Officer, Collexis Holdings, Inc.); Dennis Brunning (Electronic Resources Manager, Arizona State University); Sue Polanka (Head, Reference and Instruction, Paul Laurence Dunbar Library, Wright State University); Steve Leicht (COO, Collexis Holdings, Inc.); Mark Hyer (Vice President, Science and Technology Publishing, ProQuest)

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

Each speaker shared insights on Gunter’s posed questions: what users require and what currently is innovative. Leicht: Sometimes innovation only requires one little step, and the challenge is to use tools better. The “Google gap” won’t be bridged, since we won’t see the bridge. Faculty communities require: social networking applications, expert and institutional profiles, access to publications faculty wrote in the course of their careers. Brunning: The IR enhances a relationship of researchers with librarians, the library has a role in licensed content, publishing management includes dollars, enhance beyond the property, go beyond the search, leverage meta-data. Hyer: Need enhanced abstract records and access to tables and figures (information isn’t always in captions); keep company leverage meta-data.

Innovation Session 3— Saturday, November 8, 2008

Using Blog Technology to Get Their Attention — Presented by Audrey Powers (Associate Librarian, Research Services & Collections, University of South Florida); Cheryl McCoy (University of South Florida); Gina Clifford (Webmaster, Tampa Campus Library, University of South Florida); Sue Polanka (Head, Reference and Instruction, Paul Laurence Dunbar Library, Wright State University) (Note: Listed speaker, Phil Flynn (Engineering Librarian, Wright State University) did not present.)

Reported by: Cordelia Wilson (SLIS Student, University of South Carolina) <Wilsons29209@aol.com>

Polanka shared her experiences in starting, maintaining, and marketing her blog No Shelf Required, www.libraries.wright.edu/noshelfrequired. Her blog, which is geared toward publishers and librarians, is meant to initiate discussion on eBooks. Polanka highlighted several features of her blog, including polls and podcasts of interviews.

Librarians Powers and McCoy discussed at length the background of the blogs they created (STM NEWS@USF Libraries, usflibraries.typepad.comstmnews/ and CVPA NEWS @ USF Libraries, usflibraries.typepad.com/artes/) to keep the faculty in the sciences and arts at their universities informed of new developments and news. They also went into the benefits of their blogs, including the enhanced ability to communicate collection development initiatives to appropriate faculty. In addition, they described the challenges associated with the blogs, such as the difficulty in getting others to post. Finally, Powers and McCoy demonstrated features of the two blogs.

At the conclusion, Clifford compared the capabilities and features of three popular hosted blog options — Blogger.Com, Word Press, Com, and TypePad.Com. She considered the level of IT expertise required for each. Next, she offered advice about principles to follow when designing and organizing blogs. Clifford also recommended strategies to optimize a blog’s ranking by search engines.

Hyde Park Corner Sound-Off — Presented by Chuck Hamaker (UNC-Charlotte) and Katina Strauch (College of Charleston)

In this annual Charleston Conference session, Hamaker and Strauch involved sound-off session attendees in a 2008 conference recap (until hotel employees began re-arranging chairs for another event). Speakers identified themselves, voiced opinions. “Lively Lunches” were proclaimed to be lively again and even a “not a morning person” enjoyed the “Beastly Breakfast.” New “dance-arounds” and “vendor chats” received mixed reviews, but votes to “try again next year.” Conference sessions organized by subject “threads” received a thumbs-up. Of interest: what is the (plenary/concurrent session) selection process “behind the scenes?” The first plenary session (by Derek Law) “set the tone;” other plenaries were deemed to be “good, but not exciting or provocative.” Some decreed: too much duplication and concurrent session overlap. First-timers enjoyed small group discussions on practical matters, specifics. Trends and “hot in 2008” topics: re-surfacing of pure citation analysis (to judge individuals); differentiating activities best done at local and regional levels; “how to spend less with more,” eBooks, and statistics... The conference is: democratic, an opportunity to meet people & network. It breaks down barriers with vendors, broadens horizons, engenders “ideas that are yet to be born in my mind,” and it is a “crime not to come each year.” One attendee was a “Katina and Chuck groupie” who comes each year. Conference Website administrators’ reminders: stay connected throughout the year, share photographs, “hassle” speakers to send their presentations...

This concludes the reports we received from the 2008 Charleston Conference. Thanks again to all of the conference attendees who volunteered to become reporters, providing highlights of so many conference sessions. For information about the 2009 Charleston Conference visit the Charleston Conference Website at www.katina.info/conference.

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Speaking of names from the past, got an email from the incredibly awesome Karen Hunter just the other day! I had just asked the he-keeps-up-with-everything-and-everybody Chuck Hamaker what Karen was up to and lo and behold comes this email! Magic! Turns out that Karen wanted a copy of an article she wrote in the February 1997 Against the Grain called “Things That Keep Me Awake At Night.” The article was based on a presentation she made at the Charleston Conference in November 7, 1996. And, twelve years later, it is incredibly accurate. Karen has promised to update her nightmares for a future issue of ATG and believe me I will hold her to it! I am also trying to pin her down to speak at the 30th Charleston Conference next November. If you see her, be sure and remind her that we are all waiting for her to come back!

I am sure that I have left Rumors out!! If I have write me and remind me. And also be sure and check the ATG NewsChannel which has many more Announcements and Rumors than we can put in the print edition. www.against-the-grain.com/

I am sorry to say that, thanks to my ankle, I will not be in Boston at ALA Midwinter. Y’all have fun without me! In the meantime, much love to you all and HAPPY NEW YEAR!

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