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And They Were There

Reports of Meetings — 24th Charleston Conference Issues in Book and Serial Acquisition, Charleston, SC, November 3-6, 2004

Column Editor: Sever Bordelian (University of Mexico) <sbordelia@unm.edu>


Session — Measuring Success — Thursday, November 4, 2004 — Presenter: David Brown (Head of Publisher Relations, British Library) Report by Caryl Ward (Head of Acquisitions, Binghamton University Libraries) <cward@binghamton.edu>

What values and successes can the British Library celebrate? Is the value of that Library and its services being recognized, and how can other libraries measure their own value? The British Library is one of the five largest research libraries in the world. David Brown, Head of its Publisher Relations, graciously stepped in for Natalie Ceeney to speak of the need to establish some measurement of the Library’s success in order to enhance goodwill internally and to establish reasons for the British government to continue funding the Library. David recapped a project that used an outside firm to query individuals and organizations using the British Library, to assess the value of some services, including document supply, bibliographic services, reading rooms, educational services, and public programs.

David reports that the results were positive, indicating that the British Library generates a value of 4.4 times the level of its public funding. “What now?” David asked following the analysis. He suggests that librarians must continue to strive for success in a changing world by developing strategies to increase libraries’ value. David’s recommendations to other libraries wishing to embark on a success-measuring analysis include taking care to determine what success actually is for an individual library, and monitoring its economic and social value. He also says to identify the target market, to articulate a clear strategy for the process, and to continue to measure and review all performance regularly. This was a fascinating presentation, relevant to all publicly funded institutions. For details, see Natalie’s powerpoint presentation on the Charleston Conference’s Web page: http://www.katina.info/conference/2004%20Presentations.htm.

Session — New and Improved Serials Review Process in the Age of the Electronic Journal — Thursday, November 4, 2004 — Presenters: Jill Emery (Director, Electronic Resources Program, University of Houston Libraries), Mary Beth Thomson (Head, Acquisitions & Collection Development, University of Houston Libraries) Report by Caryl Ward (Head of Acquisitions, Binghamton University Libraries) <cward@binghamton.edu>

Many academic librarians and teaching faculty are not familiar with the options and costs associated with e-journals, not surprising since each subscription period brings changes. Jill Emery and Mary Beth Thomson shared the methodology and results of a recent project, part of which investigated the selection and evaluation of e-journals at the University of Houston Libraries. For libraries facing another serials review that includes online journals, their report and strategies are enormously helpful. At the University of Houston, the annual serials review involves the faculty, who suggest new titles, cancellations, and format. The entire process has become more complex as electronic journals were added. The project was developed to document e-access was available for current print journal subscriptions, to identify open access titles, to continued on page 66

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vices. He explained what the difference is between a fixed and a sliding discount and how to negotiate them. He also provided quarterly reports of the fill rates and the number of orders per category. In other words, he asked the right questions to ask all our vendors, questions that were often as important as the answers. After a year of using this information to track and compare vendors with whom we do business, I was able to determine which vendors were best at meeting the needs of our library.

Vendor as Research Collaborator

As an academic librarian, I am well positioned to perform research in an environment where it is generally emphasized and highly respected. Sharing research through publications or presentations is sometimes due to our individual commitment, or through combined efforts with another library colleague, and sometimes, we collaborate with non-librarians as well, such as our faculty. However, I found an opportunity to collaborate in my most recent research efforts with a vendor representative/librarian, Stuart Grinnell, of Ambassador Books and Media Services (ABS).

Due to my review of vendor performance to maximize purchasing power in spite of diminishing budgets, I noted a problem with fill rates of paperback editions. Why did the cost of binding per book by the vendor cost more than our local bindery charged for serials binding? And why were the books sometimes received well over 45 days later? I needed a partner in this research query and I needed a vendor to answer my mystery.

In the spring of 2004, with Stuart Grinnell of ABS, in collaboration with our local bindery, National Library Bindery Company of Georgia, we beta-tested a new ordering process whereby the paperback edition was preferred and sent directly to our locally selected bindery, which would ship the rebound paperbacks directly to our library. The expected results of the new workflow were to decrease the turnaround time between order placed and received, and to reduce the binding costs, too. Due to the support and flexibility of the vendor and bindery, the test in streamlined workflow saved the library over 50% in binding costs alone.

Vendor as Professional Supporter

Vendors support our conferences by attending as exhibitors, often times as guest speakers for our programs, and they are dues-paying members of our professional organizations. Vendors support our organizational efforts by providing opportunities for professional growth and development through programming grants, scholarships, and gifts. Many are active members in our professional organizations and participate in meetings such as the Charleston Conference.

Many national, regional, and state professional publications enjoy the support of library vendors and suppliers. As past editor of Mississippi Libraries, I became keenly aware of the support that some vendors have provided faithfully by advertising over the years in our Mississippi Library Association publication, many of whom attend our annual state conference as well: National Library Bindery Company of Georgia, The Library Interiors Group, Ambassador Books Services, Southern Library Bindery Company, SIRS, Brodart Library Supplies and Furnishings, and University Press of Mississippi.

Conclusion

Due to my own experiences with vendors, particularly since 2001, I have come to respect and appreciate the many contributions our vendors make. These contributions include the quality of products and services they provide, their willingness to train and inform librarians to do business with them more effectively, sharing in the discovery of new ideas, lending their support to the library profession, and celebrating our professional partnerships at conferences and meetings. Librarians and vendors have been partners and collaborators for a very long time. We are both interested, often intensely, in the needs and concerns of libraries, collaborating always in our efforts to serve our users in the best way possible.

Reference

flag the journals that are “free” with current print subscriptions, and several other options. Challenges included drafting a document to explain how e-journals may be priced, given all the variables and the dynamic nature of journal publishing. The subject librarians carried out the research swiftly—beginning last February with information training sessions and question and answer sessions in April. By May, the order forms for new titles were submitted and a completed spreadsheet listing serials was ready by June 30th.

Jill and Mary Beth reported that the final spreadsheet included publisher, title, various cost options, method of e-access delivery and notes. They recommended selection criteria including necessary licensing conditions; preferred considerations (such as perpetual access); recommended content considerations, and recommended added features (such as searching capabilities.) The end result of the project was the recommendation that new journal purchases should be in electronic only format.

Session — Writing a Bold New Chapter on Librarian-Vendor Relations: Dialogue and Collaboration — Friday, November 5, 2004 — Presenters: Yvette Diven, Organizer (Director, Product Development, Serials, R. R. Bowker LLC), Adam Chester (Assistant Director, Sales & Library Relations, American Chemical Society), Terry Ething (Director, Electronic Publishing, Cornell University Library), Rollo Turner (Secretary General, Association of Subscription Agents & Intermediaries)

Report by Caryl Ward (Head of Acquisitions, Binghamton University Libraries) <cward@binghamton.edu>

The overflow crowd listened intently to representatives from publishers and vendors, who talked about how all parties can work together to improve service. Rollo Turner reminded the group that agents are intermediaries who work with publishers as well as librarians. With customers on both ends, they need to make a value proposition and to work well with all clients. Adam Chester (from the American Chemical Society) spoke of the give and take in discussions, which helps with refinement and development of new services. There should be a sense that everyone is working together. Adam stressed that librarians need to keep talking and make their wishes known to publishers. The presenters also talked about the need to put pressure on publishers and agents to “do it right”—when something goes wrong, notify the parties involved and demand what is wanted and what was paid for. For small publishers, the need for communication is even more crucial as there is more to lose when subscriptions are cancelled. Dialogue and collaboration promote understanding. Participation at this session was enthusiastic. Attendees expressed the need for good service as budgets diminish and electronic publications proliferate, and the willingness to cooperate with service providers to achieve the common goal to deliver information to the reading community.

Session — Budgeting for Print and Free Online — Saturday, November 6, 2004 — Presenter: Robert Alan (Head, Acquisitions & Serials, Pennsylvania State University)

Report by Caryl Ward (Head of Acquisitions, Binghamton University Libraries) <cward@binghamton.edu>

How to budget for journals when there are so many pricing options? What about those “free” online journals that accompany print subscriptions—is it necessary to budget for higher percentage increase for print plus free online than for print only? Penn State’s Robert Alan talked these and other questions recently after it was recognized that the yearly price increases for print plus online may be higher than other journal pricing format options. Print plus free online is no longer the preferred model for major publishers. Several have begun charging for online versions and others will follow in 2005. What do these price increases mean for Penn State’s collections budget, especially since online journals exceed 50% of the total budget allocation? Bob explained that in response to increases, a sample list was gathered for comparison, and trends monitored. Print plus free online journals were tracked separately. It was determined that the price increased for print plus free online did not always exceed price increases for the other options, but there was a significant price increase the year prior to a change in the model away from print plus free online. Like many academic libraries, Penn State has cancelled many print journals to cover inflation. If online access to remote users would be affected, selectors in large decentralized environments need to consider their users, and be prepared to contribute additional funding for print plus “free” online for all campus locations. Although online only may not be the preferred option, it may be the only one that fits the budget. While the faculty response to e-journals is positive in the sciences, in some areas of the Humanities (notably Linguistics and Religious Studies) print is still preferred. Judging by the response of the audience for this session, this is an issue facing many libraries and Robert’s presentation was well received.

Session — Will We Be Around In The Future? Librarians and Publishers In The 21st Century — Saturday, November 6, 2004 — Presenter: Richard Gedyne (Sales Director, Oxford University Press)

Report by Elizabeth R. Lorbeer (Collection Development Manager, Rush University Medical Center) <Elizabeth_R_Lorbeer@rush.edu>

As long as there are authors and readers, a need exists for intermediaries to provide information. In the current model of academic scholarly publishing, peer review and journal prestige are the primary focus of quality articles. However, with the need for information integrity and quality, the scholarly research where a paper is ranked by total links, auto citation count, downloads and institutional prestige. Would authors be responsible for establishing their own metadata tags? If so, will it be the scholarly community’s responsibility to maintain integrity and quality, besides archiving? Through digitization, users now have an entire library on a portability device. Yet, there needs to be software development that takes into account future compatibility of hardware. Both publishers and librarians will take on new roles in the 21st century.

This presentation is available for viewing on the Charleston Conference Website: http://www.katina.info/conference.

Session — Vendor Integration Protocol: Communication, Transparency and Probable Industry Standard — Saturday, November 6, 2004 — Presenter: Shelley Neville (Technical Product Manager, Dynix Inc.)

Report by Ramune Kubilius (Galter Health Sciences Library, Northwestern University) <rkubilius@northwestern.edu>

Shelley Neville (Dynix Inc.) informed approximately two dozen session attendees, mostly acquisitions librarians and book service vendors, about Web technology trends, software industry standards, and variant stages of client server technology development — in material vendors’ computer systems and those of ILS vendors. Dynix felt motivated to develop and share its vendor integration protocol (VIP), currently in Phase 1, since it can improve the acquisitions communication process between systems and lead to the adoption of industry standards. As a librarian, Neville has “taken this show on the road,” participating in group discussions and meetings at ALA (“the more people use this protocol, the more

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standard it becomes”). Several materials vendors took advantage of the free distribution of the Software Developer Kit (SDK), and per Neville, another ILS vendor’s Website announced related work on the same concept. De facto standards exist and they are necessary for vendors to stay competitive — it’s in their self-interest and improves service. Neville raised questions, later discussed by attendees: Can a common data set be developed? What’s in VIP Phase II? Can ILS vendors work together? To which standards/other organization should this be taken — NISO? AAL? Other? Some standards will be retail driven, since they are business-to-business.

Session — Fortune Telling — Saturday, November 6, 2004 — Presenters: Michael Koenig, Moderator (Professor, College of Information & Computer Science, Long Island University), David Goodman (Associate Professor, Palmer School of Information Science, Long Island University), Bonnie Zavon (Public Relations, HighWire Press, Stanford University), Michael Pelikan (Technology Initiatives Librarian, Pennsylvania State University Libraries), Eric Hellman (Founder/President, Openly Informatics, Inc.), George Porter (Engineering Librarian, California Institute of Technology Library System).

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

Michael Koenig (Long Island University) chaired a “futurist” panel, consisting of David Goodman (Long Island University), Bonnie Zavon (HighWire Press, Stanford University), Michael Pelikan (Pennsylvania State University), Eric Hellman (Openly Informatics, Inc.), and George Porter (California Institute of Technology). The panelists presented visions of the next five to ten years, each with a “customized” individual crystal ball.

Zavon predicted more online forums, ripe for comment. Journals will break out of issue-based silos, and scholarly publishing costs will be borne in an ecosystem, by users and producers — balances in the system will change. Librarians will lend their expertise, tapping into the brave new world as partner.

Pelikan advised listeners to expect the unexpected, and referred to super cookies (associated metadata gone wild) and the Moby Dick portal (related objects/items that are accessible, transparent, ubiquitous). Client-side fascination, content separate from presentation, and the “age of the cell phone” will continue.

Hellman predicted that software for libraries will leverage global metadata sources and enable individual content collections. User interfaces will be browse-centric, not search-centric, and will look like iTunes — one click and data loads. His summary? The future is usually staring us right in the face.

Porter predicted continued consolidation, new entrants to the field. If we don’t take advantage of the short window of opportunity to converse with players, the key players will seek their own directions. Visionaries and zealots are not the same. Good metadata leads to provenance leads to reputation.

Goodman advised session attendees not to count on technology that may or may not happen. There should be no assumptions that storage capacity is a limiting factor. No one predicts social trends — be ready. It’s not the payment distribution, but what kind of communication we will have, that is the critical issue.

Moderator Koenig remembered that he’d written in the mid-1980’s about information systems technology stages (manipulate data, store it, move it around), and proposed the possibility that we’re now approaching the fourth stage. Panelists and discussants seemed to realize it was their last opportunity (if they were not attending the Rump Session) to be lively and share their opinions during the 24th Charleston Conference. Themes and threads abounded: economic dislocations; scholarly publishing participants, elements and forms; taxonomies, etc. As participant Sally Morris (ALPSP) observed, three of the hardest entities to predict are the intertwining-technology, behavior, and economics.

This completes our reports from the 2004 Charleston Conference. The entire Charleston Conference Proceedings has just been published by Greenwood/Libraries Unlimited.

<http://www.against-the-grain.com>