And They Were There -- Reports of Meetings -- SALALM 52; eBooks in the UK: Reports from the STM, London International Book Fair; UKSG, and the E-Books and E-Content Conference; plus the conclusion of reports from the 2006 Charleston Conference

Editor
Borders, and their corollary, immigration, have always held a keen interest for Americans. After 9/11, border issues came to the forefront, especially our 1,951 mile long border with Mexico, the most frequently crossed international border in the world, legally, and illegally. SALALM’s theme this year, “Borders: Obsession, Obstacle, Open Door?” captured this renewed interest. As a border state, New Mexico was an appropriate place for reflection on the complexities of this topic. Alfredo Corchado, Mexico Bureau chief for the Dallas Morning News, introduced the conference by relating his personal experience as a narco reporter writing about drug trafficking and drug-related violence on both sides of the border. His first-hand account about threats against his life was frightening. His speech set the stage for a series of panels that encompassed a variety of disciplines including history, political science, health science, economics, society and culture, and the arts.

Sponsored by New Mexico State University and the University of New Mexico, SALALM 52, the Seminar on the Acquisition of Latin American Library Materials, met in Albuquerque, April 27-May 1, 2007. As customary, various groups and committees met before the conference to discuss practices and share new developments. Over the years, SALALMistas have enjoyed meeting their colleagues face-to-face to report the latest news at their committee meetings. Bibliographic instruction, cataloging, electronic resources, gifts and exchanges, reference, and interlibrary cooperation were represented. Regional groups such as CALAFIA, LANE, LASER, and MOLLAS and cooperative projects such as LARRP (Latin American Research Resources Project), LAMP (Latin American Microform Project), and HAPI (Hispanic American Periodicals Index) all had a chance to meet. Following are reports from some representative panels. In time, SALALM will publish the full proceedings of the conference.

The theme panel “Latin American Art Collections,” brought together professionals from Argentina, England, and the US. Norma Palominodiscussed how she set up the archives of the Centro de Artes Visuales of the Instituto Di Tella in Buenos Aires, while Erica Foden-Lenahan, from the Tate Museum in London, reported on major Latin American collections in the UK. The Tate Gallery itself is a newcomer to Latin American art and librarians there are beginning to build a Latin American collection. Obstacles include financial resources (especially postage costs), language barriers, and a lack of communication between librarians and curators, which she referred to as a “professional border.” Unlike the Tate, MoMA in New York has a longstanding interest in Latin American art. It exhibited Diego Rivera in the 1930s and had other Mexican art showings in the 1940s. This interest was revived in 2000 and Taina Caragoldiscussed how MoMA acquires its library collections (mostly exchanges and donations with some purchases) and how it attempts to work directly with artists to acquire their documents.

Three speakers participated on the panel on Human Rights and Human Myths. Tom Davies, Professor Emeritus at San Diego State University, spoke passionately about the abuses experienced by the Latin American gay community. Being gay in Mexico violates the machismo culture, the Catholic moral code, and can be severely punished by the police. Discrimination goes beyond personal prejudices and permeates society. He pointed out that gay rights are human rights. As an activist, he is involved in legal cases to protect the human rights of LGBT people. Border activist Sally Meisenhelder, of Las Cruces, NM, discussed the case of the 450 murdered women in Juarez and Chihuahua, since 1993. To this day, there has not been an official investigation of the cases, and there is strong suspicion of Police involvement. Meisenhelder is a member of a solidarity organization called “Amigos de las Mujeres de Juarez” which provides financial, logistical, and emotional support to the families of the victims. The two barriers encountered are moving money from the U.S. to Mexican human rights organizations, and the language barrier. The third speaker, Socrates Silva, talked about organ trafficking in Latin America. With a very poignant title: “New Cannibalism.” He stated that the traffic of organs goes from the South to the North, from the poor to the rich, from brown to white. Documented cases exist for the sale of kidneys in Brazil. While this is certainly a serious issue, the lack of documentation encourages the creation of a mythology around the topic which feeds into the existing fable of the “white ogre.” The rumors are a way of resisting the practice. While the current laws forbid the buying and selling of organs, some activists advocate legalization, in order to stop the criminal trafficking.

The border town of El Paso was the leading character in the panel “Pictorial, Archival and Archaeological Perspectives on Border Research.” Claire-Lise Bénaud, from the University of New Mexico (UNM), discussed the digitization of two postcard collections depicting the 1916 punitive expedition against Pancho Villa while Claudia Rivers, from the University of Texas at El Paso, also displayed photographic collections from renowned El Paso photographers. Troy Lovata and Tim Castillo, both from UNM, reflected on the shared environment of El Paso and its counterpart in Mexico, Ciudad Juarez. They elaborated on the fluidity of businesses and radio stations, and movement of people between the two cities. Similarly, panelists in “Art Crossing Borders,” discussed art on both sides of the border. Beverly Joy Karmo gave a brief history of art work along the California border from the 1980s to today. Most art is politically charged and reflects the confrontational views against both the American and Mexican governments. She particularly spoke about the Border Art Workshop, which combines art and activism, established in San Diego in the mid-80s. Russ Davidson, showed posters depicting agrarian reform, a recurring theme in Latin America. Posters were produced in countries which had ambitious land reform programs, such as Mexico, Cuba, Peru, and to a lesser extent, Chile. Governments of the region enlisted artists to support their agrarian reform programs, which dealt not only with redistribution of land but also redistribution of power, and brought to the forefront bigger ideals such as solidarity, national unity, indigenous rights, national defense, and democracy. Many were innovative graphic artists who displayed sophisticated ways to disseminate information about such programs. Peter Stern, from the University of Massachusetts at Amherst, gave an account of Roberto Berdecio, a Bolivian artist who first exhibited in La Paz in the 1920s, then moved to Mexico, and then to New York City where he was a muralist in the late 1940s. He is a good example of a cross border multicultural leftist intellectual from Latin America of that era.

SALALM ended with a town meeting where members of the organization had a chance to voice concerns and new ideas. SALALM wants to be a vibrant organization and is actively recruiting new members, and is looking into ways of involving new attendees.
in more substantial ways. Unlike other library organizations, book dealers (aka “libreroos”) play an important role as librarians. Not only do they come for business purposes, but libreroos also participate in the conference as panelists. A constant goal of SALALM is to integrate the business and academic sides of the conference. Join us next year in New Orleans, May 30–June 3, 2008. The theme for 2008 will be “Encounter, Engagement and Exchange: How Native Populations of the Americas Transformed the World.”

**eBooks In The UK — A Report From Some Recent Conferences**

Reported by Anthony Watkinson (Centre for Publishing, University College London) <anthony.watkinson@btopenworld.com>

Once again eBooks are becoming important and a topic of serious thought and of course central to the programs of meetings. It is not just a matter of a fashion coming into prominence again because this time publishers are actually committing themselves instead of talking about plans. If anything, there is even more activity in the UK than there is in the US. A big driver in the UK is the enthusiasm displayed by JISC through its eBook Working Group. The URL is http://www.jiscollections.ac.uk/workinggroups/ebooks.aspx. There will be more on forthcoming projects below. This enthusiasm is reflected in three conferences held in April and May this year in England and in the excellent attendance at all of them.

I am giving follow-up references to the conferences in question because I am picking out only a very few insights. There was a lot of much more in the presentations.

There is what now appears to be an annual eBook seminar from the International Association of Science, Technical and Medical Publishers (STM). The title this second year was (wittily) “Book 2.01.” Many but not all of the presentations can be found at http://www.stm-associations.org/presentations/2007-presentations-book-201ondon/. STM is so keen on eBooks that they even had a satellite event during the London International Book Fair. The title was “Building an eBook Collection.” This was apparently very much over-subscribed and indeed standing room only. The three presentations on this occasion are at http://www.stm-associations.org/presentations/2007-presentations-book-201ondon/. The audience, at least of the former meeting which I attended, was very largely publishers. Secondly there was the annual conference of the United Kingdom Serials Group (UKSG). An excellent session was devoted to eBooks because they are now subscription items. The presentations do not yet seem to be up anywhere but there is an excellent blog at http://liveserials.blogspot.com/2007_04_01_archive.html. Although the UKSG is the parent of and inspiration for NASIG it has an audience of all players in the information chain with intermediaries very prominent. Finally there was the one-day conference on E-Books and E-Content organized by John Akeroyd, formerly the head of library and information services at South Bank University, who put together two successful occasions in the prehistoric days of 2001 and 2003. This time John’s initiative was hosted by University College London (School of Library Archive and Information Studies and Centre for Publishing). The bulk of the audience of over one hundred was librarians. The program is available at http://www.ucl.ac.uk/slais/e-books/ but the presentations, though expected, are not yet available.

The context for all three/four occasions was set out by Professor David Nicholas at the last meeting in his welcome address. eBooks plus e-journal are likely to transform the e-environment for researchers, instructors and students than e-journals on their own. Spikman speaking to the STM publishers told them that librarians wanted to integrate eBook access and e-journal access. This is of course obvious but it is easier said than done. It was pointed out by Chris Armstrong at UCL that surveys show that there is a disappointing lack of usage of eBooks in academic libraries which must trouble librarians and publishers.

In general terms the trouble is that there are rather a lot of barriers in place and also some serious challenges.

There was a general agreement with the message from Rick Schwieterman from OCLC speaking at UCL—— unify and simplify. This is what their surveys show is wanted by librarians. Wanting to lead patrons to the right content. They do not want to manage complex systems. It is difficult however to see who will manage the systems on behalf of their users if they do not there were no answers either in the presentations or in the discussion that carried any weight. As usual standards are crucial and publishers are certainly not taking enough interest in standards from metadata to MARC records.

There was a lot of rather diffuse discussion about Google as friend or foe. What happens to the OPAC and does it matter was concerns that divided librarians. At the main STM meeting Dr. Michael Holdsworth, formerly the academic CEO at CUP, provided some incisive answers and predictions. Google would be monetising content (how?) by the end of the year. The Amazon upgrade will be a pivotal tipping point this year. Will it involve Amazon dictating terms?

The use of eBooks in e-learning is especially problematic. UK is different from the US in part in both problems and solutions. Caren Milloy also at the UCL occasion explained UK national investment in this area and in particular the imaginative project grandly entitle the National eBooks Observatory. For information see http://www.jisc-collections.ac.uk/projects_and_reports/coll_ebooksproject.aspx. In an impressive presentation at UKSG Tom Davy of Thomson Learning set out the publisher dilemma. The UK market for textbooks is not growing. Publishers can only win market share. Is there an electronic solution and how can publishers work with libraries? The cutting edge is an uncomfortable place to be and publishers and booksellers too have to re-invent themselves. Davy plumbs for granularity as part of the answer but had no overall solution and nor did anyone present except for OECD in their special niche (see www.oecd.org and follow the links). What are the economics here? Davy suggested that the provision of books as part of a course fee might be the only answer.

CIBER research has revealed how little we know about reading online among scholars and students. This is not an easy area to research but why are publishers spending so much money on e-learning without understanding how learning skills operate in the digital environment. There are results to come but not yet in publications — http://www.publishing.ucl.ac.uk/superbook.html.

Throughout all the presentations and the question/answers there was a strong sense of work in progress. In the early days of e-journals some of us thought we were going to find a plateau soon. In the case of eBooks we know there is no plateau to find. Christoph Chesher of Thomson & Francis was called a evangelist for eBooks in the publishing community pointed out at the STM meeting that we cannot talk about eBooks in the static sense. Customer demands are changing all the time.

It was great to be at conferences and seminars which did not present a parade of vendors of all sorts setting out their wares with maximum hype. The next great Charleston Conference in its planning stage is considering how to scrutinize aggregators of all sorts in this space. Another lack was any serious consideration of publisher and library models. You could say that publisher’s models come first and that librarians react to them. There will have been yet another conference partly on eBook models. It is also happening at University College London June 28-29. Information can be found at http://www.ucl.ac.uk/slais/e-publishing/. Yes, this is basically about publisher offering and library reaction in the context of drivers of change. The title is indeed Models in Flux. However it could be argued that publishers now have the experience and the confidence to assert their own needs, their own models, more actively in eBooks than they did at the start with e-journals, not forgetting that the Big Deal itself was a joint enterprise. The Observatory project (mentioned above) is an interesting initiative in modeling for e-learning. As far as e-monographs is concerned there are of course various plans for library-run publishing. The most visible comes from the Australian National University (http://express.anu.edu.au/about.html) but is it sustainable? Is monograph publishing sustainable in any case?

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Charleston Conference Reports compiled by: Toni Nix (Asst. to the Editor, Against the Grain) <justwrite@lowcountry.com>

Session — Thursday, November 9, 2006 — Making Our MARC: Purchasing Periodical MARC Records from Vendors — Presented by Eleanor Cook (Serials Coordinator and Professor, Appalachian State University), Jason Price (Life Sciences Librarian, Libraries of Claremont Colleges), Roberta Winjum (Coordinator, Technical Services, Vanderbilt University), Glenda Alvin (Assistant Director for Collection Management, Tennessee State University)

Report by Julie C. Harwell, MLIS (Training Resources Manager, EBSCO Industries, Inc.; Phone: 205-980-3788; Fax: 205-981-4087) <jharwell@ebsco.com>

In Making Our MARC: Purchasing Periodical MARC Records from Vendors, three academic librarians shared their experiences with acquiring and managing MARC loads from various vendors. Overall, each library experienced some pros and cons but recommended exploring the use of MARC records from vendors. Eleanor Cook (Serials Coordinator and Professor, Appalachian State University) opened the session with a presentation on the experiences of the Western North Carolina Library Network (WNCLN) with their use of OCLC, Serialsolutions, MARCIVE and EBSCO A-to-Z. The WNCLN is composed of three academic institutions, and they use a central catalog using INNOPAC. They use a single record which lists all formats and use a successive approach for title changes. They experimented with purchasing record sets, but no longer use that method and prefer to download individual records from OCLC for items not available elsewhere. Cook noted that one of the primary advantages of using a vendor for MARC records is the maintenance of the title additions/deletions and coverage updates for their electronic resources. Some frustrations they have experienced are incorrect access holdings especially associated with partial or custom packages, match points for ISSN (matching on either the print or online ISSN is needed) and they invariably end up with duplicate records when they load updates. Roberta Winjum (Coordinator, Technical Services, Vanderbilt University) reported on the use of MARCIt when they moved from SerialsSolutions to SFX. They use 18,839 records and receive monthly updates which require an ISSN, but they anticipate other match point options in the future. They receive updates more often if new e-journal collections have been added. Winjum outlined their workflow which utilized Perl scripts; once the ILS retrieves the file, they edit for local changes and then load the records. They perform a complete re-load each time to avoid duplicate records. Jason Price (Life Sciences Librarian, Libraries of Claremont Colleges) related Claremont’s use of SerialsSolutions and recommended using a hosted URL instead of loading MARC records with holdings. The Claremont Colleges is a consortium of five

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undergraduate colleges and two graduate institutions. Instead of a consolidated record with all formats, they use a dual record system with a separate entry for the electronic format. Price praised responsiveness to questions and concerns, citing an example of when a lock on updates to a specific field inadvertently suppressed updates to the 780/785 and 6xx fields, and the company worked quickly to resolve the problem.

**Session** — Thursday, November 9, 2006 — **IRs By the Numbers: Rumors and Realities of Institutional Repositories** — Presented by Cat McDowell (Digital Projects Coordinator, UNC Greensboro)

Report by Heather S. Miller (SUNY Albany) <hmiller@uamail.albany.edu>

Inspired by publications about institutional repositories (IRs) based on survey data and doubting some of the findings, McDowell set out to determine the true state of institutional repositories in this country. Her criteria for an IR were that it must be institutional, must include multiple types of scholarship, must include database functionality and must be live, actively taking submissions. She used multiple methods to ferret out every possible IR and had found 96 by the end of October. The growth rate has slowed significantly. She found a variety of platforms in use and variation in geographical distribution and by type of school, and noted that more than half of ARL libraries do not have IRs. Looking at the content of IRs, she found that most content is not scholarly in nature, casting doubt on the IR being the answer to the scholarly communication crisis.

**Session** — Thursday, November 9, 2006 — **Federated Searching with a Simple Search Box** — Presented by Kathryn Silberger (Automation Resources Librarian, Marist College)

Report by Heather S. Miller (SUNY Albany) <hmiller@uamail.albany.edu>

Marist has adopted a simplified library Web page, organized by majors and using the terminology of the major, along with a single search box called “Fox Hunt” accompanied by a large, catchy graphic of a fox by which one can search core databases (OPAC, subject specific and general databases) and Google and Google Scholar at the same time. This is SerialsSolutions Central Search. Use has increased, including the use of small collections. Students and faculty love it and seldom use the advanced search capability. Students recognize quality when they see it so the inclusion of Google has not been a problem. The entire Web page is visually uncluttered, intuitive and requires few clicks for successful use.

**Session** — Thursday, November 9, 2006 — **Journal and Article Locator: Federated Access to Electronic/Print Journals and Article Full-Text** — Presented by Michael Norman (Head of Content Access Management, University of Illinois at Urbana-Champaign), William Mischo (Engineering Librarian & Head, University of Illinois at Urbana-Champaign), Mary Schlembach (Assistant Engineering Librarian, University of Illinois at Urbana-Champaign), Wendy Shelburne (Electronic Resources Librarian, University of Illinois at Urbana-Champaign)

Report by Julie C. Harwell, MLIS (Training Resources Manager, EBSCO Industries, Inc.; Phone: 205-980-3788; Fax: 205-981-4087) <jharwell@ebSCO.com>

In Journal and Article Locator: Federated Access to Electronic/Print Journals and Article Full-Text, four librarians (Michael Norman, Head of Content Access Management; Head, William Mischo, Engineering Librarian & Head, Grainger Engineering Library Information Center; Mary Schlembach, Assistant Engineering Librarian; Wendy Shelburne, Electronic Resources Librarian) from the University of Illinois at Urbana-Champaign shared progress updates on various tools for providing access to electronic resources for UIUC patrons. This was the third consecutive year that UIUC presented on various ongoing projects to facilitate access to resources and their work on interoperability between systems. To a group of approximately forty attendees, three resources were reviewed: the Online Research Resources site (ORR, http://www.library.uiuc.edu/orr/), the Journal and Article Locator (JAL, http://search.grainger.uiuc.edu/linker/), and the Grainger Engineering Library Website (http://search.grainger.uiuc.edu/top/gotoTop-38.asp).

Using weekly feeds from TDNET, ORR is a locally developed e-resources directory which provides subject browsing, title browsing or title searching within a specific category (such as Reference Tools) or all categories. It includes an RSS feed. JAL is their link resolver via SFX(r). The Grainger Engineering Library Website serves as a one-stop research portal and was developed internally by building their own federated search engine (of which they are willing to share) and programming queries to other resources like ORR and JAL. The main portion of the Grainger portal entry contains four “portlets” or expandable menus which provide the following prompts: Look for articles, papers, books on a topic; Look for a specific journal title; Look for full-text of a specific article in a journal; Look for a specific book or conference proceeding. The result is a simple, friendly, easy-to-use site which provides robust searching and linking among their various resources, and I look forward to hearing about patron usage behavior studies and the expansion of this portal to other libraries within UIUC.

**Session** — Friday, November 10, 2006 — **I Hear the Train A Comin’** — **LIVE session** — Presented by Greg Tanenbaum (Consultant & Entrepreneur), Ann Okerson (Associate University Librarian, Collections & International Programs, Yale University), Peter Banks (Founder, Banks Publishing), Isabella Hinds (Senior Director, Blackboard, Inc.), Andrew Pace (Head of Information Technology, NC State)

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

An attendee could interpret this plenary session title a variety of ways regarding the train: coming: Are we in the train ahead or across the tracks or in a car waiting to cross the tracks? Are we the “damsel in distress” who’s been tied up and placed across the tracks? Modera-
tor Tanenbaum played a low-key role, but did set the stage: What do the speakers see as transformation issues in 2007-2008? Speaker Pace talked about ecosystems (patron technologies, eBooks, content ecosystems, ILS). Libraries are in 1.0, while the real world is in 2.0 — for libraries it’s catch-up, not innovation. Is the ILS akin to the horseless carriage? We’re looking for systems that are: vertically integrated, open source, dis-integrated, interoperable. Speaker Banks amused the audience with his comment “Everything I know about scholarly information I learned from iTunes.” He applied Chris Anderson’s Long Tail theory to markets, products. No one model suits traditional subscription-based, new, or OA publications (OA doesn’t change the fundamental model of publishing). Users are already being empowered: new pricing; academic publishing wikis; community-based peer-review; expert filtering of content and the formation of social/intellectual communities. Speaker Okerson talked about key avenues of transformation, lack of interoperability between current systems (instant messaging, wikis, travel reimbursement systems, even the Charleston Conference Website). It’s hard to predict success. Everyone is either a hedgehog (knows only one thing) or a fox (knows many things), and all is on the edge of radical change. Libraries should shape in collaboration with users since they drive the system. Speaker Heinz reminded attendees “It’s the student, stupid.” In the U.S., 90% academic institutions select standard course management systems (cms); cms standards are converg-
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Lively Lunch — Friday, November 10, 2006 — What You Always Wanted To Know About European Libraries But Never Dared To Ask — Presented by Arend Kuester (European Business Development Manager, Publishers Communication Group)

Report by Julie C. Harwell, MLIS (Training Resources Manager, EBSCO Industries, Inc.; Phone: 205-980-3788; Fax: 205-981-4087) <jharwell@ebsco.com>

In What You Always Wanted To Know About European Libraries But Never Dared To Ask, Arend Kuester, European Business Development Manager, Publishers Communication Group, led an interesting

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Q & A driven session which began with a Google imaging comparison of the United States and Europe that sparked a discussion on cultural characteristics. Kuester, a native of Germany, emphasized that within a very small geographic area, Europe has a highly regional culture and structure which not only has multiple languages across borders but also sometimes multiple official languages for a single region. One unusual language challenge for some libraries is that dated collections are composed of languages no longer known by local patrons and were previously acquired based on the official language of an occupying country. European libraries face similar funding challenges as their colleagues elsewhere. You see librarians working also as school teachers to make ends meet, and for library budgets, inclusion within the European Union plays a significant role. EU funding is project based for 2-3 years with matching by the state. There are not many private universities; most are funded by the state. Patron populations are not as segmented; in other words, “everybody is a library user who lives within the radius of a library. There is a staggeringly high number of users” which becomes an issue when pricing is based on a registered number of users. Librarians travel far less for professional development, and within academic libraries, collection development is driven largely by faculty. Kuester closed the session with some tips for vendors when working with the European market.

Editorial boards should include representation from Europe, and unless it is part of a strong brand name, publication names should not include the term “American” or “British” as these will be assumed as specific to the region named. Vendors should keep in mind that there are varying rates for VAT (value added tax) based on format. Books and hard copy receive a discount but e-only incurs the full VAT rate. The VAT, unless it is part of a strong brand name, publication names should not include the term “American” or “British” as these will be assumed as specific to the region named. Vendors should keep in mind that there are varying rates for VAT (value added tax) based on format. Books and hard copy receive a discount but e-only incurs the full VAT rate. The VAT, unless it is part of a strong brand name, publication names should not include the term “American” or “British” as these will be assumed as specific to the region named. Vendors should keep in mind that there are varying rates for VAT (value added tax) based on format. Books and hard copy receive a discount but e-only incurs the full VAT rate.

Approximately 60 people attended this session, which offered an overview of two different digital archiving options available to libraries and publishers — “Controlled Lots of Copies Keep Stuff Safe” (“CLOCKSS”) and “Portico” — as well as a look at how one university press is experimenting with a number of different options.

Vicky Reich, Stanford University:
CLOCKSS is an implementation of the LOCKSS system, created to establish a global, comprehensive archive held on behalf of the broad community to ensure access without regard to subscription access (meaning that in a “trigger event,” all content is made available to everyone.) CLOCKSS includes journals and proceedings (and is looking to include books), and preserves both the publisher’s content and the publisher’s presentation of the content. Governance is provided directly by libraries and publishers in partnership as board members. CLOCKSS is currently grant-funded, and is working with partners (including the Library of Congress) to determine long-term business models, and expects to raise an endowment over the course of the next five years. The system is hosted by libraries, and is based on open source, geographically distributed, independently administered repositories. The CLOCKSS board controls the release of content rather than the publisher.

Eileen Fenton, Portico:
Portico is a JSTOR initiative that was formally launched in 2005 as a permanent archive for scholarly journals. Although the intellectual content is preserved, the publisher’s presentation (the “look-and-feel”) is not, with source files converted to a standard, normalized format. There is a board of librarians and publishers that advise (but do not provide direct governance) of Portico’s activities. Revenue comes from annual fees from both libraries (based on a library’s total materials budget) and publishers (based on a publisher’s total journals revenue). The system is based on the JSTOR technology. Unlike CLOCKSS, the publisher controls the release of content during a trigger event, not the Portico organization.

Fiona Bennett, Oxford University Press:
Oxford University Press has developed a broad archiving strategy by entering into agreements with LOCKSS, CLOCKSS, Portico, and the Dutch KB. The decision to make agreements with a number of archiving organizations was based on having a proactive approach — the idea of “spreading the risk element” and experimenting with different options, as follows:

Dutch KB: a deep archive, but no migration options and no perpetual access
Portico: as of March 2006; controlled access
LOCKSS: a distributed approach
CLOCKSS: two-year pilot started

Fiona observed that OUP’s archiving initiatives are now a key part of the library sales process, that archiving options are now expected as the norm by librarians, and that amending licensing agreements (with clear language!) is key.

Future Dates for Charleston Conferences
Preconferences and Vendor Showcase Main Conference

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Sara Nelson of Publisher’s Weekly asked panelists representing publishers, librarians, literary agents and authors to discuss several questions surrounding eBooks. One topic of interest is how librarians are buying eBooks. Jeanne Pyle, University of Texas at Tyler, said they look for the best deal, the best access, and the best fit for their needs but it seems no one is sure whether to buy, lease, or get eBooks on demand. Do you buy packages or individual titles? Olaf Ernst of Springer said they are even considering a model whereby one can buy just a chapter on demand. James Gray, Coutts Information Services, said boundaries are disappearing with agents selling eBooks, consortia buying them, and we’re just navigating through a maze of questions. The word “eBook” was noted as a truly imprecise term as there are DOIs on the chapter level which makes it very much like a journal. One also needs to distinguish between academic and trade titles when discussing their presentation of the content. Governance is provided directly by libraries and publishers in partnership as board members. CLOCKSS is currently grant-funded, and is working with partners (including the Library of Congress) to determine long-term business models, and expects to raise an endowment over the course of the next five years. The system is hosted by libraries, and is based on open source, geographically distributed, independently administered repositories. The CLOCKSS board controls the release of content rather than the publisher.

Eileen Fenton, Portico:
Portico is a JSTOR initiative that was formally launched in 2005 as a permanent archive for scholarly journals. Although the intellectual content is preserved, the publisher’s presentation (the “look-and-feel”) is not, with source files converted to a standard, normalized format. There is a board of librarians and publishers that advise (but do not provide direct governance) of Portico’s activities. Revenue comes from annual fees from both libraries (based on a library’s total materials budget) and publishers (based on a publisher’s total journals revenue). The system is based on the JSTOR technology. Unlike CLOCKSS, the publisher controls the release of content during a trigger event, not the Portico organization.

Fiona Bennett, Oxford University Press:
Oxford University Press has developed a broad archiving strategy by entering into agreements with LOCKSS, CLOCKSS, Portico, and the Dutch KB. The decision to make agreements with a number of archiving organizations was based on having a proactive approach — the idea of “spreading the risk element” and experimenting with different options, as follows:

Dutch KB: a deep archive, but no migration options and no perpetual access
Portico: as of March 2006; controlled access
LOCKSS: a distributed approach
CLOCKSS: two-year pilot started

Fiona observed that OUP’s archiving initiatives are now a key part of the library sales process, that archiving options are now expected as the norm by librarians, and that amending licensing agreements (with clear language!) is key.

Future Dates for Charleston Conferences
Preconferences and Vendor Showcase Main Conference

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<th>Year</th>
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<td>2007</td>
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And They Were There
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current and future usage. When asked about eBook Readers, Richard Curtis of Richard Curtis Associates, Inc. suggested that the tablet PC will be primarily used. eBooks still come with unanswered questions but appear to be here to stay.

Session — Friday, November 10, 2006 — A Shared Library Collection Development and Management Program at Colby, Bates and Bowdoin Colleges — Presented by Sherrie Bergman (Librarian of Bowdoin College), John Harrison (Associate College Librarian for Collection Development and Bibliographic Services, Bates College)

Report by Katherine L. Latal (Head, Acquisitions Services Department, University at Albany, University Libraries) <KLatal@uamail.albany.edu>

Sherrie Bergman and John Harrison presented a detailed history of reciprocal borrowing between Colby College, Bates College, and Bowdoin College and the ongoing project to build and maintain their three collections as one. In 2005, the campuses received a grant from the Andrew W. Mellon Foundation to develop a collection collaboratively. With the grant they will assess the feasibility of ongoing cooperative collection development, utilize software tools to identify collection overlap, examine overlaps in both monographs and serials, and identify areas of strength. Four subject areas are the focus of the current analysis and development of a workable model. Additionally, the project will include establishing a joint approval plan and investigating shared journal and eBook purchases. They noted that the three college libraries have worked together for 30 years and that students already consider their collections as one.

Session — Friday, November 10, 2006 — Serials Data and Serials Reviews: Bring it All Together — Presented by Steve McGinty (Social Sciences Bibliographer, W.E.B. Du Bois Library, University of Massachusetts Amherst)

Report by Tim Hagan (Serials Electronic Resources Librarian, Northwestern University Library) <t-hagan@northwestern.edu>

Steve McGinty discussed and demonstrated the methods he has used at the University of Massachusetts at Amherst to collect and compare journal information beyond vendor supplied usage stats to aid in UMass’s serials management decisions. Faced with the need to cancel some subscriptions, McGinty wanted to move beyond supplied vendor stats and UMass’s local reshelving data in selecting journals for cancellation. His goal was also to reduce faculty panic or indifference when journals were chosen for cancellation.

McGinty created spreadsheets of journal titles based on subject categories. The spreadsheet for psychology titles contains data on their inclusion in Magazines for Libraries, their inclusion in Pam Baxter Directories, UMass faculty citations and published articles, and psychology journal impact factors. The audience was appreciative of McGinty’s methods and had a number of suggestions for expanding or modifying the data. Among these were looking into interdisciplinary journals, indexing data, including ejournal stats, adding the package journal is received with and a suggestion to use MSAccess instead of a spreadsheet.

Some of the limitations of the study were discussed including that citations in books were missed, past performance isn’t necessarily a predictor of future, and the time and labor involved.

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Session — Friday, November 10, 2006 — Copyright in the Content Workflow — Presented by Edward Colleran (Senior Director, Rightsholder Relations, Copyright Clearance Center), David Hoole (Head of Content Licensing & Brand Marketing, Nature Publishing Group), Karen Oye (Head of Customer Services, Case Western Reserve University), Dan Specht (Director of Operations/Chief Financial Officer, Atlas Systems)

Report by Julie C. Harwell, MLIS (Training Resources Manager, EBSCO Industries, Inc.; Phone: 205-980-3788; Fax: 205-981-4087) <jharwell@ebSCO.com>

Moderated by Edward Colleran, Senior Director, Rightsholder Relations, Copyright Clearance Center, Copyright in the Content Workflow presented three perspectives of professionals from a publisher (David Hoole, Head of Content Licensing & Brand Marketing, Nature Publishing Group); an academic university (Karen Oye, Head of Customer Services, Case Western Reserve University); and a vendor of interlibrary loan and e-reserve products (Dan Specht, Director of Operations/Chief Financial Officer, Atlas Systems). Their proclaimed goal is to make copyright as ubiquitous as possible with automated copyright management and solutions streamlined within all of the content workflows, including coursepack, e-reserve, and interlibrary loan management. Specht began the session with an emphasis on the need for process driven development — understanding what the staff and users must interface with. By breaking down the complete process and all potential variables, not just the routine steps, you can best create a system that contains sufficient elasticity and intuitiveness to ensure successful implementation and adherence or compliance. It is much easier to comply and be aware of the various issues of copyright if a system provides triggers/prompts a user at the appropriate time within the natural workflow. He presented a screenshot of the Ares e-reserve management system which allows a user to never leave the native interface of Ares in order to access the Copyright Clearance Center. Atlas worked with the CCC to ensure that they could provide a back-end interface to provide a transparent experience for Ares users which included working out alternatives for addressing copyright when the CCC could not handle the transaction.

Oye initiated her presentation with a survey of attendees to verify their background. About 75% were involved within interlibrary loan in a library setting, 60% with e-reserve, and 10% were vendors. Oye has three main goals when looking at copyright within the workflow: to achieve more output with less time involved in training and generating the output itself; fewer problems/troubleshooting with various systems; the ability to pull data when needed with flexible criteria, for example isolating the rule of five for a specific title over a specified time period to facilitate collection development decisions). She encouraged attendees to appreciate that diffusion of a working knowledge of copyright issues is a constant, slow and subtle process. It is incremental but not impossible. There has been growth in specialized copyright officers on intellectual property offices within university communities and attendees should verify or seek out such experts when available at their institutions. Oye highly recommends the annual symposium by the Center for Intellectual Property, University of Maryland University College (http://www.umuc.edu/distance/odell/epip/archive.shtml) held each June.

Hoole noted that twenty years ago there were very straightforward guidelines and rules for managing copyright. Now rights vary considerably and there are no standard rules. Subsequently, publishers have seen an explosion in the number of letters/inquiries for use. These requests also reflect the effect of the Internet on the distribution of material; the kinds of requests are becoming more varied in how someone wants to use and portray the content. During the Q & A, an attendee brought up the challenges of resource sharing in the electronic environment and they have found that they cannot supply items from their electronic resources via interlibrary loan. The panel and other attendees encouraged everyone to be positive advocates for pursuing model licenses and noted that e-resource contracts are still evolving. It’s important not to be adversaries on this topic; it could be quite simply that the default contract has recycled language from another product or area. Libraries should be open and upfront about their expectations regarding resource sharing and e-resources.


Report by Katherine L. Latal (Head, Acquisitions Services Department, University at Albany, University Libraries) <KLatal@uamail.albany.edu>

Susan E. Thomas discussed the pros and cons of the eBook. Although eBooks are more convenient, searchable, and compact, they have not yet replaced print as once expected. Thomas included some reasons why the eBook may remain unpopular: screen resolution, slow pace of reading, its impact on the absorption of information, poor reading comprehension, and lack of special memory in the digital environment. Alix Vance provided ideas on how to incorporate eBooks into a collection and encouraged trying new selection models. She recommended being as agile and flexible as possible when setting up usage and that any barriers to usage should be avoided. Setting up a pilot program to allow patrons to select eBook titles was also suggested. Anne Cerstvik Nolan shared the experience of adding eBooks to the collection at Brown University. Beginning in 2005, eBooks were purchased using three different models from three different sources. Each package has its own, platform, leasing or purchase requirements, loan period, copy and paste functionality, and printing options. Other issues eBooks present include: how many platforms can one library afford to maintain, duplication between print and eBooks, and the impact on the existing selection tools, such as approval plans.


Report by Helen Szigeti (Business Development Manager, HighWire Press, Stanford University) <hszigeti@stanford.edu>

Approximately 35 people attended Marthyn Borghuis’s session on predicting full-text article usage in university libraries. Marthyn Borghuis offered the preliminary results of the study he conducted on usage of Science Direct at universities in the UK, universities in the Netherlands, and two sets of US-based universities (the NERL consortium, and the University of California Digital Library system).

Marthyn reviewed the main usage drivers he took into account for his study, offered a look at some general trends he discovered, outlined his basic assumptions, and then reviewed the UK, Netherlands, and US data. Of note: Where usage once showed distinct spikes at certain times of the academic year (such as high spikes in April and November, and low spikes in August and December), seasonal usage has now “flattened” a bit because more researchers, faculty, and students are able to access e-resources wherever and whenever they want. This is true not just in North America, but in Europe and Asia, too. Academic institutions with a similar number of staff have similar usage patterns, and a growth in staff will correlate directly with a growth in usage.

However, teaching-intensive institutions have different use patterns than research-intensive institutions.

In a large, research-intensive university setting, preliminary data indicate that librarians could expect approximately 200 downloads per year per staff member.

Report by Heather S. Miller (SUNY Albany) <hmiller@uamail.albany.edu>

Noting the now common principles of “least effort” and “satisficing,” the moderator set the stage for discussion of providing means for library users to more readily find needed materials through simplified searching. He also noted that most queries are simple and seldom Boolean and that this trend is most pronounced with undergraduate students. Most of them start their research with Google, leading to the marginalization of the OPAC at a time when it is most needed. He described the demand for direct links to full text as “near fanatic.”

Speakers proposed several ways of dealing with this situation, including “recommender systems” and RSS feeds, including saving search results in RSS. Datema noted that people want to know what other people like and sites such as CiteULike make it easy to see that. It is possible to build one’s own library with RSS feeds. An example is a blog that contains all the Cold Spring Harbor Lab publications. By searching in such a predetermined context, meaningful results are more readily obtained. Ojala said that while librarians may like to search, users just like to find what they want quickly and easily. In the best case scenario, she envisions a collaborative Library 2.0 world with intuitive interfaces, no licensing wars, accessible information, profitable producers and satisfied seekers where searching and finding coalesce.

Session — Friday, November 10, 2006 — ArXiv.org in the Library Environment — Presented by Jean Poland (Associate University Librarian, Cornell University), Simeon Warner (Moderator/ Research Associate, Cornell University Library), Reynold Guida (Director of Product Development, Thomson Scientific), Terry Hulbert (Head of e-Development & Strategy, Institute of Physics Publishing)

Report by Heather S. Miller (SUNY Albany) <hmiller@uamail.albany.edu>

When ArXiv.org moved to Cornell with its founder, Paul Ginsparg, the Cornell Libraries considered it an opportunity to improve ArXiv.org and to free Ginsparg for professorial work. Originally intended as a means of rapidly sharing preprints in high energy physics, the archive has new features including RSS feeds and TrackBacks. There are 17 mirror sites and users from 150 countries. Self-archiving works well. Submissions are date stamped to prevent confusion among versions. Three quarters of the submissions are from outside the U.S. Subject areas have expanded to include math, nonlinear science, computer science and quantitative biology. Poland and Warner described what this has meant for the Cornell Libraries. They have added moderators, adapted the archive’s classification scheme, changed the logo and instituted an advisory board. Additional functionality is planned. The submissions process has been tightened, requiring submitters to register and be endorsed for a particular subject area, agree to the license and enter metadata. There are 200-300 submissions per day and a daily alert is sent to 15,000 subscribers. A funding model is needed to provide the ca. $200,000 it costs yearly to maintain it.

Guida described the links between ArXiv.org and Web of Knowledge which integrates the traditional journal interface with the free archive by harvesting full text and metadata from ArXic.org. Hulbert described a similar linkage with IOP’s Eprintweb.org service. They have added a user friendly front end with RSS feeds, reference linking and other features. The result is the “largest subject archive in the world” which enhances the dissemination of information and fits the IOP mission. Cornell is eager to work with partners, but emphasized that it will not sign an exclusive agreement with anyone.

Session — Saturday, November 11, 2006 — Web 2.0 – What’s In It For You? — Presented by Stephen Rhind-Tutt (President, Alexander Street Press)

Report by Heather S. Miller (SUNY Albany) <hmiller@uamail.albany.edu>

Publishers commonly view Web 2.0 without enthusiasm because it portends loss of control, loss of proprietary gateways and features that are not created by publishers, but Rhind-Tutt has learned to love Web 2.0. Recognizing that linking is key to connecting and combining intellectual content from many sources, he is enthusiastic about its ability to “unlock value.” He noted that a new medium is emerging, somewhere between a listserv and a journal article with various content, including images and personal comment, and he thinks Web 2.0 can work well in an academic setting. Alexander Street Press offers both free and fee products and embraces features of Web 2.0 in them. In discussing indexing, Rhind-Tutt concluded that combining folksonomies with taxonomies results in more than the sum of the parts because in certain situations folksonomies work better while in other situations taxonomies work better. The very term Web 2.0 reflects its philosophy quick, simple, polyvalent, where speed is preferred to precision. He concluded by saying that Web 2.0 is “just another tool for publishers and librarians that will improve what we do.”

Session — Saturday, November 11, 2006 — Managing the Virtual Library — Presented by Jane Burke (Vice President and General Manager, Serials Solution)

Report by Heather S. Miller (SUNY Albany) <hmiller@uamail.albany.edu>

Burke exhorted librarians to join the revolution, saying that the nature of collections has changed, there is a new world of users, that courseware and Google are the lingua franca and that “we can do anything, but not everything.” She urged us to give up whatever is not appreciated — print and checking in and claiming serials. We need to be where the users are and be able to deal with volatile and various electronic resources — e-journals, open access journals, eBooks, e-music, institutional repositories, electronic reference sources, data sets. We must accept risk and embrace Web 2.0 where “harnessing collective intelligence” is the operating principle. The end result is a rich user experience. The challenge is making our collections part of it.

Many tools will help us do this, if we make use of them. Federated search should be in use now in order to give people the simple search they want. Many tools for result processing include relevance ranking, visual display and results clustering pioneered by Vivissimo. A new discovery layer — new integrated library system (ILS) tools, OpenWorldCat, Google Scholar — will replace federated searching. She assumes libraries have electronic resource management systems and that they will become the acquisitions module. The library ILS and publisher gateways all will be based on XML. RSS notifications can replace check-in and claiming. Link resolvers are critical, skip the landing page and expand the reach of the link resolver with “search within the link.” Buy metadata and save local talent for local resources. Use hosted systems. Hosted authentication systems will replace the likes of EXProxy. She urged libraries to “Hurry up!” and “Flip the switch” because “this is a revolution.”

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

Presenters Asbury and Geitgey, with some interruptions from impatient listeners, described one “better together” option. Partnership with a “print on demand” company (in this case, BookSurge LLC (http://www.booksurge.com/), an Amazon.com company, headquartered in Charleston, SC) can increase marketing/distribution, especially of already digitized institutionally owned content. Asbury posed / answered questions. What to publish? Special collections items, library or parent institution-copyrighted scholarship, public domain content likely to be digitized (prefaces can be copyrighted). Why? To fulfill libraries’ mission of providing broader access, create a revenue stream (cost recovery for digitization, preservation), increase patronage of libraries’ collections, promote libraries in a global “collection.” Asbury listed POD advantages: no inventory, the economics of publication and selling on the global level, and ensured perpetual content availability, regardless of demand. Geitgey shared the U. of Michigan’s Scholarly Publishing Office evolution from periodic provision of fledgling print shop low cost reading copies (Phase I), to true online ordering, then hardcover reprints and softcovers, and now partnership with BookSurge. Challenges? ISBN block purchases / assignment (Amazon is piloting selling with ISBNs); drowning in the title wave. Still, POD provides a valued service, capitalizes on the institutional digitization investment. In the future, subsets will be identified for metadata and file enhancements as well as extraction, administrative / record-keeping system improvements. Session attendees discussed the relations between university presses, university libraries and their scholarly publishing offices.

Session — Saturday, November 11, 2006 — Collection Analysis Activities at Southeastern Research Libraries — Initial Findings & Results — Presented by Judy Ruttenberg (Project Librarian, Triangle Research Libraries Network), Glenda Lammers (Global Product Manager, OCLC, Inc.), John Burger (Executive Director, Association of Southeastern Research Libraries), Paul Metz (Director, Collection Management, Virginia Tech University Libraries)

Report by Elizabeth C. Henry (Technical Services Librarian, Saint Leo University) <Elizabeth.henry@saintleo.edu>

Collection Analysis in Southeastern Research Libraries was presented by librarians from three different institutions, each giving us the benefit of their experiences with the WorldCat Collection Analysis services.

The first presenter was John Burger, ASERL Executive Director. Thirty-seven member libraries use information gained from WorldCat Collection Analysis for program accreditation, purchasing requirements for new programs, weeding, and the identification of materials unique to each institution. All who are using the service like it: some are finding it easier than others. Two problems frequently encountered are the identification of peer groups and the use of specific subject headings for analysis.

Paul Metz, Head of Collection Development at Virginia Tech, was the second speaker. At Virginia Tech, the Collection Analysis services are applied almost exclusively to monograph collections with two primary objectives. The macro- purpose was to do broad comparisons with peer institutions while the micro- purpose was to drill down to the title level and determine what titles in specific areas may have been missed. Mr. Metz pointed out that a library can compare its subject collections to a core group of peers and/or to collections which serve as aspirations or goals.

The third presenter was Judy Ruttenberg, Project Librarian with Triangle Research Libraries Network. WCA is able to help these libraries realize their goal of identifying overlap, uniqueness, and gaps in their collections and to promote cooperative collection development. She indicated that government documents, special collections, microforms, and serials, particularly e-journals, were excluded collections.

Glenda Lammers, OCLC Global Product Manager, attended and answered questions. She reported on new functionalities which include 27 pre-formatted peer groups and the ability to connect to ILL data.

Session — Saturday, November 11, 2006 — Library Strategic Planning for the Transition away from Print Journals — Presented by Roger C. Schonfeld (Manager of Research, Ithaka)

Report by Julie C. Harwell, MLIS (Training Resources Manager, EBSCO Industries, Inc.; Phone: 205-980-3788; Fax: 205-981-4087) <jharwell@ebSCO.com>

To a group of 40 attendees, Roger C. Schonfeld, Manager of Research, Ithaka, offered six tactics for Library Strategic Planning for the Transition away from Print Journals. Schonfeld predicts that a transition to “electronic only” is definitely going to happen, whether it is managed strategically or not, within the next five to eight years. Schonfeld gave a similar presentation at NASIG 2006 and has a forthcoming article (http://www.ithaka.org/research/completed-projects/resolveUid/26c873cbbdf41c9d3e9ad8089d72) within The Serials Librarian 52, no. 1/2 on this topic. Schonfeld recommends implementing a transition to e-only sooner rather than later and committing to a thoughtful, strategic plan to do so. “A chaotic retreat from print will almost certainly allow libraries to realize the maximum potential cost savings; whereas a managed, strategic format review can permit far more effective planning and cost savings.” As part of such a strategic plan, the following six considerations were presented as most important: examine user needs; a faster transition has real cost advantages; some publishers have a difficult transition to make; which functions no longer need to take place; electronic archiving; and print archiving. When examining user needs, Schonfeld advocates surveys with strong statements that prompt true reactions or provoke responses. For example, in a 2003 nationwide survey by Ithaka, 50% of faculty agreed with a statement that indicated they would be “fine with their library getting rid of a print format as long as online access was available.” While some faculty disciplines were more willing than others, there is definite forward movement for all disciplines regarding the transition to e-only. Regarding the cost advantages of moving more quickly than incrementally to e-only, Schonfeld emphasized that collecting in dual formats results in a loss of revenue or revenue that could be deployed for other purposes and that “scale effects can make the intermediate phase to e-only more costly” as you have to support two workflows/procedures for different formats. At a minimum, print cancellation policies should be part of current collection development policies; and ideally a strategic format review should take place. Libraries should commit to canceling a percentage of print at specific intervals, such as 30% each year for three years, and they might prioritize cancellations based upon the academic discipline (keeping in mind any accreditation requirements that specify print access), the publisher, or the similarity between the print and electronic versions. Some other criteria include canceling the print versions for titles that are currently taken in dual formats, and canceling the print version when a journal is added to Portico (http://www.portico.org), LOCKSS (http://www.lockss.org) or JSTOR (http://www.jstor.org).

For information on the 2007 Charleston Conference or to register online visit the Charleston Conference Website at www.katina.info/conference. — KS

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