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And They Were There -- Reports of Meetings -- 23rd Annual Charleston Conference Issues in Book and Serial Acquisition, November 5-8, 2003, Charleston, SC.

Editor

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And They Were There

Reports of Meetings — 23rd Annual Charleston Conference Issues In Book and Serial Acquisition, November 5-8, 2003, Charleston, SC.

Column Editor: Sever Bordeianu (University of Mexico) <seb@unm.edu>

"Using Microsoft Access as a way of Managing Serial Collections"

Report by Kathryn McCarthy (MLS student, University of South Carolina) <katmccarthy@yahoo.com>

Paul Bazin, the Serials Librarian at Providence College, R.I., had a problem. The Library Director had just "requested" a comprehensive inventory of the serials collection as a part of the library renovation that was about to take place. The Director wanted this report in six weeks.

Paul solicited the help of a young co-worker, Janice Schuster, the Coordinator of Reference Services, to aid him with this project. Together with an extremely talented student worker, these three used Microsoft Access to develop an accurate, detailed, up-to-date collection management system.

This certainly wasn't an easy task. To give the reader a little bit of background, Providence College is a four-year liberal arts institution with approximately 4,200 FTE students. The majority of these students are undergraduates. There is only one main library at this college, the Philip Memorial Library, and there are no branches associated with it. Philip Memorial contains 312,000 books and bound periodicals, approximately 100 controlled databases, 1,650 print periodical subscriptions, and Philip Memorial is a Government repository. In addition, Providence College is a member of a consortium that includes eight other colleges in the area sharing a catalog called HELIN.

The process of tracking this database took about a year (so maybe if your director wants the information in six weeks, this may not be the ideal way to provide it). The first month was devoted to planning. The second step was to gather all the information about periodicals in one place. For instance, some of the information was in HELIN while other bits of the information were on cards. Next, it was necessary to incorporate the existing data and check it against what actually was on the shelves. The student workers did an excellent job of double-checking; no mistake has been found in their calculations so far. Collaborating with the reference staff and the EBSCO invoice, the librarians determined all of the fields that would be needed for the database. Both Bazin and Schuster emphasized that the fields must be decided upon before one starts Access, because it is difficult to add fields once the format is created.

Bazin and Schuster thought Access worked wonderfully for this project, because Access allowed the user to create very in-depth fields and reports, while allowing very flexible input. Now, librarians and staff workers can easily look up information on any serial at Providence College; for instance, one can view reports on current titles, cancelled titles, microfilm only titles, or find out the Hegis Code, ISSN, determine which online databases have it, and whether the title is available in print, just to name a few of the possibilities.

Certainly, a lot of time and dedication was needed to complete this project, but the amount of time it now saves by automatically compiling reports and keeping everything organized on one user-friendly database is priceless. If you want to know more, feel free to contact Paul at <pbazin@providence.edu> or Janice at <jschuster@providence.edu> and they'll be more than happy to send you screen shots and their Power Point presentation.

"Purchase Instead of Borrow — An International Perspective"

Report by Anthony Watkinson (Consultant, 14, Park Street, Bladon, Woodstock, Oxon, United Kingdom, OX2 1RW; Phone: +44 1993 811561; Fax: +44 1993 811067) <anthony.watkinson@btopenworld.com>

In this session Gayle Chan explained a model developed by the University of Hong Kong, which she felt might have relevance to other libraries. At the university it had been established that it was more efficient in most cases to buy most books from abroad rather than obtain them through inter-library loan. The questions asked were which method was faster, and most cost-effective. The calculations were only concerned with books and with books not available through local sources. Certain types of books were excluded. If an item bought was used more than twice after purchase the cost of purchase would be covered. The library had secured patron support in this policy development and considered that the new policy optimized library resources.

"Archiving With A Trusted Third Party"

Report by Anthony Watkinson (Consultant) <anthony.watkinson@btopenworld.com>

In this session Yvonne Lev, Associate University Librarian at Towson University, moderates a discussion on this topic and also introduces speakers from OCLC and JSTOR. Towson is not primarily a research university and the proximity of Johns Hopkins serving the research community enables a concentration by the library on student needs. Departments were offered a choice or print or electronic journals where vendors allowed such a choice. The great majority of departments selected the electronic options.

However librarians at Towson where concerned about continued access should the publisher discontinue the journal or go out of business or in circumstances where the library decides to stop subscribing. Publisher policies, as expressed, did not alleviate such concerns. Towson therefore looked at available solutions to these problems. These solutions included costly participation in schemes like LOCKSS.

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Rumors

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2003 Emisphere Productivity Award and the second was a EmisNorms Award, for excellent service, responsibility, and commitment. Judy has provided excellent information service to support various scientific groups within the company which has greatly helped them to achieve their annual goals and objectives. Judy has been very prompt and efficient in procuring rare literatures and negotiating with libraries, institutions, and publishers. Above all, she is very appreciable, demonstrates sound work ethics, and is very efficient, all of which are of great value.

Last but not least, the splendidiferous Jack Montgomery <jack.montgomery@wku.edu> writes that he's working on an interview with Judith Harvey of Emerald and that he also has a Wandering the Web on cookbooks coming up.

See you in April! Yr. Ed. 🍾

Emisphere Technologies, Inc., a biopharmaceutical company in Tarrytown, New York, won two company awards. The first was the 2003 Emisphere Productivity Award and the second was a EmisNorms Award, for excellent service, responsibility, and commitment. Judy has provided excellent information service to support various scientific groups within the company which has greatly helped them to achieve their annual goals and objectives. Judy has been very prompt and efficient in procuring rare literatures and negotiating with libraries, institutions, and publishers. Above all, she is very appreciable, demonstrates sound work ethics, and is very efficient, all of which are of great value.

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What do they offer and what costs are involved?

Chuck Costakos of OCLC (www.oclc.org) and Eileen Gifford Fenton of JSTOR (www.jstor.org) presented the solutions of their organisations.

To access journals archived and preserved for the future by OCLC, the library has to have rights from the publisher. However the OCLC deal with 70 participating publishers is that access is maintained if the library ceases to subscribe or even if the publisher drops out of the OCLC scheme. Mr. Costakos also explained other features of the OCLC archive including links to other OCLC services. Preservation techniques are based on applicable standards and evolving best practice.

Eileen Fenton mentioned the literature on archiving and preservation (www.clir.org is the best route into it) and the fact that, whereas in 2002 there was one talk on archiving at Charleston this year there were four. She drew some general rules from the research done and from the JSTOR experience of digitising print journals. She emphasised the importance of the fact that the mission of JSTOR was to archive and preserve, but otherwise there was a general agreement with the previous presentation over what was necessary to deliver a trusted solution. Criteria to look for included the sustainability of the model, a robust technological infrastructure and good relations both with libraries and with content producers.

Questions from the audience revealed that the working through of these solutions was as yet at an early stage as far as downstream migration policies were concerned and particularly where there was a requirement for the handling of multimedia content.

"Evaluating Databases in Times of Shrinking Library Budgets"

Report by Rebeca Lenzini (Publisher, The Charleston Advisor) <rlenzini@charlestonco.com>

Presented by Steven Hall (Senior Vice President, ProQuest), Beverlee French (Deputy University Librarian, California Digital Library), Chuck Hamaker (Associate University Librarian, Collections and Technical Services, Univ. of N.C. Charlotte), and Mark Sandler (Collection Development Officer, University of Michigan).

How are database decisions made? This question led off the session. In the quality vs. quantity debate (that is, judging value by the number of hits a database receives), all panelists agreed that number of hits can be manipulated easily and therefore is an inappropriate measure. Chuck Hamaker noted that MetaSearch engines will increase "hit" levels. Mark Sandler posed the issue as "a significant number of uses vs. a significant use."

Sandler, speaking of large historical files with which he has been working, uses the following criteria for evaluating commercial offerings: image quality, image format, record quality, use of standards, whether data is "intelligible," functionality, licensing terms and cost vs. value. He suggested that, in order to be good consumers, librarians must understand costs of conversion and should ask ourselves whether we (as library or a group of libraries) can build certain databases ourselves, rather than purchase them.

Beverlee French focused on de-selection of databases in a consortial setting. The California Digital Library is currently eliminating licensed content due to budget constraints. Of note, the consortia considers bibliographic databases and e-journal packages as two separate categories and evaluates them differently. French referred to current e-journal packages as a "house of cards."

In looking to de-select databases, CDL regards certain files are "core" and therefore likely to be picked up by individual libraries; these are candidates to be cut at the consortial level. Other factors considered include content overlap, functionality, and price increase histories. The consortia is also now creating scores to reward "fair, reasonable and creative vendors" vs. "high maintenance vendors" (i.e., those who are difficult and time-consuming to deal with). In examining e-journal packages, she notes that the CDL is looking to eliminate entire packages and that the least flexible publishers would most likely be the first to be cut.

"eBooks: Who Took the 'R' Out of the Revolution?"

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

Panelists: Andrew Pace (Moderator) (NC State); Martha Whittaker (Blackwell's Book Services); Judith Hiott (Houston Public Library); Steve Cohn (Duke University Press); Adam Chester (Overdrive, Inc.); Pam Turner (Overdrive, Inc.); and Christopher Warnock (ebrary).

In a lively, wide-ranging discussion, panelists acknowledged the ambiguity and unresolved issues that have held back the wide acceptance of eBooks. Publishers have yet to find a workable business model for ebooks and should stop trying

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to force them into the print book model. Books are books — everything else is electronic, according to Whittaker.

In terms of use, a similar admonition applies. Warnock thinks we will see a database of content that includes books. There was general agreement, backed by statistics, that current use of eBooks is for quick reference although all the books used in this way are not traditional reference books.

Hiott pointed out that public libraries do see use of ebooks and thinks that there will be increased reading of eBooks on devices. In another view, eBooks should be adjuncts to print, offering different, supplementary content such as art, film clips, etc. rather replications of print books.

Platforms and formats are another part of the picture. Cost is a big issue. Proprietary formats will not be successful. Open access can work for publishers, according to Warnock. Partnering may help alleviate some cost. The amazon.com model (“search in the book” and “look in the book”) is compelling.

In the end, it was acknowledged that this will play out in a variety of ways and that lack of answers is part of life with eBooks, at least at this stage of their development.

Pricing Books (Remember Them), and Booking Prices.

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

Presenters: Bob Nardini (YBP); and Pascal Schwarzer (Springer).

How the price of a book is set and what effect the price has on libraries is not a simple equation, as Nardini and Schwarzer demonstrated. Many factors affect price — production costs, royalties, overhead, page count, print run, illustrations, effects of distribution channels (bookstores, wholesalers, approval plans, etc.), where the title fits in the market and sometimes the influence of the author.

Using YBP data, Nardini showed that different subject areas have different average prices and that libraries experience different average book prices as well as different inflation rates. Within LC class QA, several price ranges up to $100 showed similar sales. While sales dropped when the price rose over $100, ranges between $100 and $200 showed sales numbers similar to each other. The data did not clearly indicate that lowering the price of a book would result in increased sales.

They found that the average number of days between the creation of a selection slip and library orders for that item was less for books priced $101 - $200 than for lower priced books, possibly due to pre-publication specials. Average book prices from YBP, Blackwell’s, the Bowker Annual and U.S. College Books vary also, leading to the conclusion that libraries would benefit from running their own numbers.


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

Presented by: Joshua H. Morrill (MorrillSolutions Research).

Morrill reported on research done for the MINITEX Library Information Network which wanted to know how people were using eBooks. Morrill found that the highest use was for quick facts and reference and that use of netLibrary bookmark, font size and note taking features was fairly low, but that people who had received training in the features used them more. Fifty two percent of the respondents browse only, 24% go on to check out the physical book and 24% print pages to read. The highest reason for use was for school or work. There was strong interest in offline use so that users would not have to maintain an Internet connection. Interest in downloading to handhelds was fairly strong, especially among people for whom English is a second language.

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Users, Collections and Technology — “Free Sex and Chocolate: How to Increase Readership.”

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

Presenter: Jerry Cowhig (Institute of Physics Publishing).

That giving people things they like gets their attention was clearly demonstrated by Cowhig’s distribution of free chocolates and flowers prior to a presentation. The IOP has been successful in doubling circulation each year since 1996 by constantly adding new features for both authors and readers of its journals. It is marketing, the use of promotional gifts, individual journal promotion and consortial contracts. In short, marketing, creating a buzz, and it should work for libraries as well as for publishers.


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

Presenter: Michael Pelikan (Penn State).

Through the use of memorable analogies, Pelikan demonstrated the effect of technology on workflow; noting that when the interface remains the same, acceptance is likely to be rapid even though the underlying technology may have changed radically. Buggy whip manufacture and distribution was a flourishing industry, now gone because the interface and workflow that used it changed. The first horseless carriage looked like a familiar carriage. Some had buggy whip holders, carrying the familiar bit far. The Edison phonograph was simplified greatly and made smaller over the years, but the end result is the same. Cell phones were readily adopted because they seemed much like the phones people were used to using. These kinds of transformations, often from large to small, have occurred repeatedly. At every stage people thought that this was the modern age, the pinnacle. The digital library is our horseless carriage. To get beyond it, we need standards, we need to simplify licensing, move past IP based licensing, in order to make it possible for people to get the information they need when and where they need it.

“Who Can We Trust — National Libraries?”

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

Presenter: Natalie Ceeney (British Library).

Ceeney noted the difference between past collecting by libraries which created massive, long lasting paper collections that have served researchers well with the present state of affairs in which we are not keeping things at all. The problem with selectivity is that no one can know what future researchers will need. We need to look at preservation at the point of creation. This requires money, new skills and leadership, the latter including standards, technology and accountability. Participants need to trust that long term archiving will be successful and reliable. National libraries are, in Ceeney’s view, prime candidates for providing this leadership, but they cannot do it alone. Partnerships are needed between libraries and technology vendors, and other groups. The British Library, at least, is moving in this direction. The fact that one library cannot do this alone was not lost on the audience, some of whom questioned the commitment of the Library of Congress to these issues.

“R&R for the New Scholar: Reorganization and Renovation for Building Collections, Technology and Services.”

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

Presenter: Susan Campbell (York College of Pennsylvania).

Campbell noted that libraries have become unworkable and unsuited to the way users work today. The York College has Microsoft Office and email available in the library, popular and successful despite librarian reluctance. They plan to renovate the library to provide a single, easily recognized, service point to be called simply “information.” They also reorganized into two divisions, Collection Development and User Services, upgraded positions and rewrote job descriptions. Librarians will manage these areas and will receive management training. All equipment is checked at this desk, requiring knowledge of 38 different kinds of equipment. Instead of a reference desk, there will be a small, informal area with soft chairs, lamps, etc. for consultation, using a laptop and a cordless or cell phone. Student needs drive the entire process.

Others noted similar initiatives using focus groups and roaming reference librarians to zero in on user needs. At York College, all staff must spend time at the information desk and all librarians must teach. Adjuncts also teach. The library classroom is busy from 8 a.m. to 9 p.m. weekdays and Saturday morning with library conducted classes. Tufts reported that their usage statistics increased (and stayed up) after the opening of a new, more user friendly building.

“Keeping Your University’s Intellectual History Alive.”

Report by Rosann Bazirjian (Penn State University) <rvb9@psulias.psu.edu>

Austin McLean (ProQuest) and Gary Ives (Texas A&M University) gave a session on “Keeping Your University’s Intellectual History Alive.” This concurrent session focused on the digital dissertations services provided by ProQuest as applied to a retrospective Texas A&M project. Overall, there are five components to the ProQuest Dissertations Service. The five components are: permanence through microform, convenience through free online access, the building of an institution’s PhD/Masters Theses repository with free online hosting by Current Research @ ProQuest, bibliographic control and the availability of publications to researchers throughout the world through Dissertations Abstracts. Austin McLean provided the audience with a summary of the Digital Archiving and Access Program and informed us that ProQuest has been digitizing all dissertations and masters theses since 1997. Their program focuses on three areas: 1) publishing (through the provision of bibliographic records), 2) preservation (through their microfilming and archiving services), and, 3) enhanced access (through the creation of a digital copy that is available to users 24 hours/day. ProQuest Digital Dissertations (PQDD) provides for searching and browsing, allows users to print their own

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was a retrospective project to digitize their dissertations. The end result was not only access to all Texas A&M dissertations, but access to all digitized content from other institutions, both retrospective (pre-1997) and current (1997-). As a result, they have seen a tremendous rise in usage. Between January 2002 and October 2002, prior to completion of the project, they saw 530 PDF downloads. From January 2003 to October 2003, post-project, they have seen 11,598 downloads.


Report by Rosann Bazirjian (Penn State University) <rv9@psu.edu>

Margo Warner Curl (CONSORT Colleges) and Michael Zeoli (YBP Library Services) gave a lively lunch session titled “Developing and Implementing a Shared Approval Plan for a Consortium of Libraries: A Model for the Cooperative Collection Development of Monographs.” The CONSORT Colleges are composed of five colleges in Ohio: Denison University, Kenyon College, Oberlin College, Ohio Wesleyan University, and the College of Wooster. Margo and Michael addressed the benefits that libraries derive from cooperation, including shared information, knowledge and expertise as well as monetary incentives. The CONSORT Colleges received a Mellon grant for cooperative collection development to reduce the need for building additional library materials space on individual campuses and to maximize the strength, currency and diversity of the individual and shared collections. In collaboration with Yankee Book Peddler they developed a shared approval plan which calls for a single profile for four of the five libraries, accommodates local selection and acquisition practices and is easy to implement and use. The plan utilizes GOBI2 and is written as though books would be sent automatically but operates in “virtual” mode. It is hoped that after this is monitored it can be turned into a books profile. The virtual nature allows for evaluation without having to manage actual books. Margo and Michael discussed an outline of the plan in detail as well as the account structure and workflow.

“Mind the Gaps! Electronic Journal Access, Missing Print Issues, and Budgets: How They Can Effect a Serials/Accessions Workflow”

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

To spur discussion, moderator Douglas P. Kiker posed some questions that have arisen in his work at University of Florida’s Smathers Libraries, spurred by his reading of two Rick Anderson articles he distributed (“A Sacred Cow Bites the Dust”, Library Journal 51:1/02, and the one written with Steven D. Zink, entitled “Implementing the Unthinkable: the demise of periodical check-in at the University of Nevada,” Library Collections, Acquisitions, & Technical Services 27 (2003):61-71. Breakfast attendees represented different viewpoints, types of libraries, geographic locations, missions. Points discussed included: print gaps noted in a holdings record vs trying to obtain missing issues later, claiming “on demand” for patron-reported gaps, staffing shortages that preclude making the process a high priority, and the challenges of dealing with electronic holdings gaps (incidental, subscription or publisher related). Discussion moved to larger archiving issues, including the “dim (print) archiving” plan in place for UF of Florida libraries (in 2004, Kluwer titles), the protected title project of District of Columbia research libraries, and the faults with the print “first deposited copy” journal archives plan of the ten campuses of the University of California libraries.

2003 Charleston Conference — A Few Comments

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

Time

I took the van to the airport with David Goodman and we both agreed that this year’s Charleston Conference pretty much stuck to the schedule. Yes, 5 minutes break between concurrents isn’t always enough, but it helped!

Tying Threads

I looked through this year’s topics, and know there were attempts to pull like speakers into panels. I very much would have liked a few more back-to-back sessions in the same room, or even combined sessions for very similar talks (if we could convince the speakers!) Maybe we can try to do more of that next year. e.g., Virtual Reference ( Concurrent III and Beastly Breakfast); Scholarly Publishing ( Concurrent I and 2); Shared Approval Plan (Lively Lunch Thursday) AND Using Common Vendors ( Concurrent II); Comic Books ( Concurrent I) AND Science Fiction Books (Lively Lunch Thursday); Project COUNTER (Thursday Concurrent) AND Usage Levels ( Concurrent III).

New Things

The little skit “one day in the life of” was pretty funny...Also, I don’t think the publishers minded “competitors” attending their vendor presentations, if the “competitors” asked first (at least that’s what Anthony Watkinson told me re: the NEJM session). It’s the transparency Phil Davis is seeking, after all!

Generally, I think the sessions went well. The keynote were good. I wish the government representatives weren’t so dry—they had important information to convey. Archiving was a common theme this year! My health sciences collection development colleagues seem to very much like the conference, told me to do the “Lively Lunch” again next year (oi vey), and actually surprised some of their main campus counterparts by being there! After all, our STM publishers were there, why not us? The reception at the Aquarium was a good venue for our crowd!

“Health Sciences Collection Development Issues: Games, Rules, and Players”

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

About three dozen librarians, publishers, and vendors attended this third annual gathering. Moderator Ramune Kubilius distributed a selected list of trends (since the 2002 CC), especially in STM publishing and archiving. Three experienced librarians shared observations and facilitated discussions. 1) Jo Anne Boorckman distributed summarized results from a February 2003 survey of MEDLIB-L discussion list subscribers on “Reference Collection Development in the Electronic Era” including feelings on: budgeting, selection tools, access provisions, etc. 2) Liz Lorbeer shared observations and examples of book and journal supplementary material challenges (print and electronic), questioned the need for some of them, and suggested that publishers could standardize presentation and licensing, especially for institutions. 3) Beth Jacoby quoted a 2003 Special Libraries Association meeting speaker who aptly observed the “earc dealership pricing” aspect of site licensing, noted the “Use of Agents” statements incorporated in the NERL Principles for Electronic Journal Licenses (NorthEast Research Libraries Consortium, http://www.library.yale.edu/NERL/public/EJnlPrinciples.html), and continued on page 71

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CC attendee packets). Discussion points included: licensing access vs content (aggregated full-text databases), recommendations on how to guarantee access while renewing electronic resources’ licenses, and the increasing roles for publisher user advisory boards.

“Scholarly Communication and the Changing Landscape of Scholarship”

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

Joyce Ogburn presented session attendees with an overview of the evolving cyberculture of scholars who may not be thinking of libraries or a record for future generations. Digital scholarship takes place to solve problems, not necessarily to be published. At University of Washington, it was determined that this arena falls within the library mission, is not a library problem, but is a campus issue, involving institutional commitment. The project involved schools, centers, departments, academic computing, and the library (including archives, collection development, technical services). It was deemed imperative to engage the input of scholars, accomplished through university administration sanctioned events reception, plenary sessions, group sessions, and resulted in “Models for Support” (standards and promotion). This process took the library to a new level (“if we don’t try, we’ll lose in the competition for time, money, whose role it is”). Power is shifting back to scholars and the institution, and sharing is promoted. An institutional repository store finds, preserves it, and relies on the institution’s community, involving management and innovation, with advantages (ensuring long-term value, efficiency for the organization and the scholar) and disadvantages (scholars move around or don’t want to share). Results can be found at: http://www.lib.washington.edu/digital/scholar/ and http://www.lib.washington.edu/SchoolComm/

“Update on Project COUNTER and User Statistics”

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

Richard Cedy and David Goodman outlined Project COUNTER (http://www.projectcounter.org) accomplishments and plans. Begun in 2002, COUNTER works toward reliable vendor usage statistics and seeks to do this with credibility and consistency. Release 1 of the Code of Practice provides definitions and specifications for core usage reports, data processing guidelines by vendors. Future releases of the Code of Practice will extend the scope of COUNTER to other content types beyond journals and databases (namely books, reference works, other media), and also to more detailed levels of content type reporting. Well-known vendors committed to compliance and others intend to comply. Half of the membership is publishers/vendors, the other half is libraries/consortia. A librarian and supplier toolkit is being developed, to assist in data merging and sorting: subscribed/non-subscribed titles, title clustering from different suppliers. Objectives for coming months: increase membership, finalize Release 2 of the Code of Practice. Still debatable areas include: the capability for unintrusive individual analysis (not to the user name level, but with permission), global use figures, inter-university comparisons. These involve privacy (commercial, institutional, individual) questions. Session attendees asked about report ownership, open access, back years. Other questions may be addressed to: COUNTER Project Director, Dr. Peter T Shepherd <pshepherd@projectcounter.org>.

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

1) Moderator Abby Smith reminded attendees about the Garrett and Waters report (tk note-1996? - http://www.irlg.org/ArchTF/) that when preservation fails, it is often not technical issues, metadata, or format (at fault), but organizational and legal issues. An author writing his memoirs wants access to newspapers from his childhood. Whose responsibility is preservation? There is a need for a trusted third party with limited redundancy. The Association of Learned and Professional Society Publishers is trying to address this issue. 2) Tim Ingoldsby indicated that learned societies must assume responsibility for preservation; they differ from commercial publishers, yet all publishers need the skill. He mentioned RLG’s preservation statements and Open Archival Information System (OASIS) for the American Institute of Physics’ policy. First developed in 1998, revised in 2003. Preservation involves not just content, but archival metadata; “subscriber” now means access to a body of material for a defined period of time. 3) Karen Hunter talked about ongoing access versus long-term storage and preservation. E-only puts greater pressure on archival preservation — archiving of both print and electronic. Archiving is high on the agenda of individual libraries and library groups; we have a responsibility to authors in maintaining “minutes of science.” Hunter quickly gave attendees a “tour” through Elsevier ScienceDirect-related archiving operations and initiatives: data but not system back-up archival annexes; re-tran-digitization; internal production “archives”; “de-facto archives”; self-designated “national” archives; official Elsevier archive; “hot back-ups” vs mirrors; re-statement of withdrawn e-articles with watermarks. 4) Sarah E. Thomas reminded attendees that the core value of libraries is to provide enduring access, even with insufficient funds to preserve; few of our institutions make a major investment. In preservation; per MIT librarian, A. Wolpert, it’s “the unfunded mandate.” Thomas reviewed vulnerabilities of all eggs in one basket (with paper archives); the 2000 Mellon Foundation journal archiving project; roles for libraries; Cornell’s Project Euclid (math and statistics); e-print archives; institutional repositories; economic models for repositories; dark vs light archives. Mirroring is not archiving or preserving. Digital preservation requires a stout heart (commitment), resourcefulness, and trust.

Access & Value — “Patterns of User Behavior: What Are Our Users Telling Us?” (Tenopir & Boyce)

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

1) Carol Tenopir focused on journal use patterns using survey results of expert/subject specialist users at three institutions: University of Tennessee, Drexel and University of Pittsburgh. Results are in D-Libr Magazine, October 2003 (http://www.dlib.org/dlib/october03/king/10king.html). Her team’s broader conclusions of electronic resources use are in CLIR, Publication 120 (http://www.clir.org/pubs/reports/reports.html). Some conclusions: libraries provide (print and/or electronic) over 73.3% of articles over 5 years old; older literature often represents re-reading of articles originally brought to scholars’ attention through current awareness; scholars adopt e-resources if convenient, relevant, and time saving; most e-journal users print out relevant articles; there is no right solution for each subject discipline. 2) Peter Boyce reminded session attendees that not all users are alike. He addressed age and productivity, of American Astronomical Society products in particular. Analogies of APS services: Atmospheres Data System, one click away from full-text, is the PubMed for astronomy; Links service—Cross-Ref of astronomy; Backfile service—JSTOR for astronomy. There is a difference in awareness, use, and submissions among “productive” and “nonproductive” astronomers (productivity based on publication). Productive scholars go through whatever lengths they need to submit, read, etc. Nonproductive scholars especially value and need ease of use. For both groups, journals are resources of choice.

Access & Value — “Money for Added Value” renamed “Library Pricing: Value Propositions” (Stern)

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

David Stern revised the title of his talk, but still focused on values and “deliverables.” Content per dollar involves content per use, immediacy vs document delivery, the competitive advantage (licensing all of a package). Functionality per dollar involves enhanced (added-value) services such as options, including links and sophisticated searching. Readers are interested in: content, their own time constraints, functionality, immediacy. Authors are interested in readership, recognition, subscriptions, cost per submission, added value functionality. Editors are interested in: quality, peer review, journal impact factors, recognition, the added value of online manuscript review. Publishers are interested in: readership, subscriptions, recognition/branding, mission return profit, citation of notification. Online journals have various services: core, support, optional. Each player (libraries, authors, readers) has value concerns. A paradigm shift is taking place in: existing publishing models, increasing non-publishing alternatives, ownership for access vs ownership. Changing pricing models result in libraries shifting allocations, reacting to higher costs, looking at consortial licensing. The future will probably involve: decreasing numbers of books, society-based editorial boards, unbundled interim delivery, post-publisher peer review, subject repositories, a layered model. There is a risk and a learning curve with change, for each of the players. Ultimately, importance is placed on user expectations and user satisfaction.

Access & Value — “Portals, Courseware, and More: Where Does the Library Fit In?” (Michlak, Whichlch, Holobar)

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1) University of Utah’s Sarah Michlak provided an overview, definitions, key concepts, and features of portals from various authorities and conferences, including: Portals: Is there a role for libraries? (European Library Automation Group, Semantic Web and Libraries 26 Library Systems Seminar Rome, 17-19 April 2002). Library.org (Key- stone Conference): “The Advent of Portals” (Mary Jackson, 9/15/02 Library Journal), portal as a tool of organizational knowledge discovery (Library of Congress); an academic google (Jerry Campbell); the new academic platform (Brian Schottlander). 2) Christopher Holobar highlighted the partnership that the library and librarians have entered into at Pennsylvania State University with the university portal (www.portal.psu.edu) and with the ANGEL (A New Global Environment for Learning) courseware system (www.angel.psu.edu). 3) Michael Whichlch described a similar seminal role at the University of Utah in the Online Campus Educational System, My.Utah.edu; the Scholar’s Portal (which has other academic participants around the U.S.). He mentioned that the developers of a portal have the challenge: throw everything at users or predefine what users see. Development and maintenance of portals, roles for collection development professionals, includes: establishing value based on relevancy ranking, determining scholarly sources to be searched, pushing the technology. It’s an integration era, collaboration is a must, users want controlled choice. Our horizon includes tools and resources that fall outside traditional library industries.

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