April 2012

And They Were There: Reports of Meetings -- ASA Annual 2012 Conference and the 31st Annual Charleston Conference

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And They Were There

Reports of Meetings — ASA Annual 2012 Conference and the 31st Annual Charleston Conference

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Reported by: Anthony Watkinson (University College, London) <anthony.watkinson@btinternet.com>

Not all readers will know about the organisation and even fewer about its annual conference, so some words about both first. ASA was founded in the UK back in 1934 but has continued to represent subscription agents and other information intermediaries as the fortunes of such entities might be said to have waxed and waned. It is international. It provides quality assurance to customers and is in “continuous consultation” with them in order to supply their “evolving needs”.

The conference was initiated fairly recently and now happens in late winter in London, providing a forum with a special twist for publishers, librarians and other vendors, as well as the vendors themselves. This year the conference happened 27-28 February and the programme was mainly devised by Nawin Gupta — the current secretary general — and his predecessor Sarah Durrant. Nawin is based in Chicago and has had a distinguished career in Reed Elsevier, the American Medical Association, and The University of Chicago Press.

There were six sessions (for the details and most of the presentations at http://www.subscription-agents.org/conferences/asa-annual-conference-2012) on the whole of high quality but, as one would expect, not always of central interest to librarians. The session titles were Context not Containers, The Semantic Webb, Libraries — What Next, eBooks — Onwards and Upwards finishing with two sessions on New Roles for the Modern Intermediary.

The first talk of the first session was something of a keynote. The thesis of Brian O’Leary — the current secretary general — and his predecessor Sarah Durrant. Nawin is based in Chicago and has had a distinguished career in Reed Elsevier, the American Medical Association, and The University of Chicago Press.

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The first talk of the first session was something of a keynote. The thesis of Brian O’Leary is indicated by his title Context First – a unified field theory of publishing. Expanded it was about the damage done by the container model of publishing which derives from the physical environment. Containers appear not to be quite the same as silos but equally unhelpful for the end users. Containers cut out context including metadata and links, which is crucial in the digital environment. To compete digitally as a publisher you have to start with the context, and this is much easier for those without the print legacy. Agile workflows should not be used as a means of improving the containers but rather as making the content more useful and usable. Alas this densely-argued presentation is one of the few not (yet?) up on the site. The second presentation came from ProQuest: it and the third presentation are available. Tim Babbitt, a senior vice-president from ProQuest Platforms addressed librarians directly. He was concerned with the “current asymmetry of customer and user” and how librarians find out what their patrons want, whether they are accessing information directly or using machines. Finally Timo Hannay spoke about the new initiative from the publisher Macmillan, Digital Science, which brings together some of the social media projects of the Nature Publishing Group into solutions for the industry.

The second session brought together two product descriptions — not straight sales talks but offering a broader perspective — separated by a much more theoretical presentation from Richard Padley, the CEO of the consultancy Semantico. Padley’s thesis — the Death of the Semantic Web — has been much aired at meetings recently but not perhaps in the context of subscription agents.

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Finally Dvir Hoffman (Ex Libris) spoke convincingly about Analytics in Library Management with a special emphasis on how library value can be demonstrated to provosts — a timely topic.

Not surprisingly we then came to eBooks — the topic of the moment and, indeed, for some years for most librarians. All three presentations were about eBook models from the contrasting viewpoints of three highly articulate vendors, two intermediaries (EBook Corporation and EBSCO), and one publisher (SAGE). All are available and probably did not add anything new. It could be argued that no model can be wholly satisfactory in a time of increased demand and decreased budget, but there were some nice ideas.

The final two sessions demonstrated what agents can do for libraries (still) and finally for publishers. There was one librarian in the group. This was Charleston stalwart Jill Emery, now in Portland, Oregon. Her presentation was a hard-hitting and explicit description of circumstances where agents do not always serve librarians as well as they ought to: the emphasis was on value. Perhaps the most significant offering in these final sessions was the presentation from David Main, the CEO of Swets. He explained the new strategies at Swets following what has clearly been a considerable amount of soul-searching by him and his colleagues since he took the help. The presentation was good on analysis but also showed the practical steps that Swets have taken to find new roles through acquisition and liaisons, for example with InforIe.
important than depth, and it’s best to amplify human interactions. **Downing** shared tools, trends, environmental scans (social, cultural, diversity, assessment, accountability) that help her in her work with university learning communities, foundations, and grants. **Dupuis** shared his belief that if one works with scientists, one must understand their culture. That includes the guideline “stop reading (only) the library literature.” He also strongly believes in being embedded in patron communities, across all higher education boundaries, and attending and presenting at their primary conferences.

Who’s Afraid of the Big Bad Wolf?: De-Mystifying Digital Rights Management  — Presented by Jillian Tweet (IGI Global); Beth R. Bernhardt (University of North Carolina Greensboro); Victor Lao (Springer); Rebecca Seger (Oxford University Press); Wendy Shelburne (University of Illinois at Urbana-Champaign)

Reported by: Kyle McCarrell (Augusta State University)  <kmccarre@aug.edu>

**DRM.** For both librarians and publishers, this term is a proverbial “thorn in the flesh.” This session, however, sought to shed light on this often confusing and splintered topic, providing an opportunity for both groups to have a conversation regarding what the problems are and how a future with (or without) digital rights management may look. Moderated by Tweet, the panel shared their opinions of DRM. Seger discussed how Oxford University Press is opting to include non-intrusive DRM like watermarks and single chapter downloads to prevent illegal copying, printing, and sharing. Shelburne and Bernhardt each talked about how confusing it is for users, including reference librarians, to know the DRM limitations for an eBook. Lao mentioned that much of Springer’s content is now DRM-free (different from Oxford), indicating the struggle different publishers are having in navigating how they can remove DRM restrictions and still sustain a profitable business model. Questions from the attendees addressed topics like how to monitor illegal downloading, how course-adopted books affect DRM, and problems with eBooks and interlibrary-loan (ILL). Additionally, the wide-ranging discussion brought up print-on-demand options and the possible development of industry standards to display to the user what the rights are for that eBook.

Managing the Collective Collection: Promises, Perils, and Pitfalls — Presented by Samuel Demas (Sam Demas Collaborative Consulting); Rick Lugg (R2 Consulting); Bob Kieft (Occidental College)

Reported by: Angharad Roberts (University of Sheffield, Information School)  <angharad.roberts@sheffield.ac.uk>

This genuinely lively Lively Lunch examined the challenges of managing down local library collections (the main focus of the session) whilst building a larger, shared collection. **Demas** led the discussion by providing three case studies of libraries’ experiences of developing off-site storage solutions or dealing with the fallout from the unintentional disposal of items which should have been retained. **Kieft** described planning, with faculty and student involvement, the downsizing of a library collection in order to improve use of library space, including the transfer of some materials to another university.

Discussion was then opened to the floor, with members of the audience sharing stories, experiences, and best practice ideas, many of which highlighted the emotive nature, within universities, of relegation and deselection of little used materials. For many faculty and students, large library stacks still seem to act as a symbol of serious academic endeavor. Many contributions stressed the importance of developing relationships and building trust within the larger organization, and navigating institutional politics. **Lugg** suggested ways to accentuate the positive aspects of a large-scale review of a collection, such as the opportunity this provides to add access points for old items to promote their use.

Improving ERM: Critical Work Flow and Operations Solutions  — Presented by Betsy Appleton (George Mason University); Shannon Regan (George Mason University); Lenore England (University of Maryland University College); Li Fu (University of Maryland University College); Stephen Miller (University of Maryland University College)

Reported by: Rob Van Rennes (University of Iowa)  <robert-van-rennes@uiowa.edu>

This well-attended Lively Lunch session featured two successful but contrasting strategies to streamline the management of electronic resources. In part one **Appleton** and **Regan** from George Mason University explained the practical uses of Serials Solutions’ 360 Resource Manager in automating their work flows to improve overall communication and organization. Significant benefits of implementing the ERM system included the reduction of paper clutter, the automated alert system that keeps interested staff members apprised of the progress of individual orders, and a central location for storing internal notes.

Part two of the presentation featured **England**, **Fu**, and **Miller** from the University of Maryland University College who enlightened the audience on applying business process management methodologies to optimize electronic resources management operations. **Miller** explained that although there is a long history and a wide variety of business models to enhance various processes, UMUC selected the Six Sigma approach to scrutinize workflows, analyze problems, and ultimately implement fixes to improve overall productivity. One of the main tenets of the system is to uncover the small inefficiencies in a process and make incremental changes that will result in long-term savings in regards to cost and time.

THURSDAY, NOVEMBER 3, 2011
CONCURRENT SESSIONS 1

The Future of eTextbooks: One Year On  — Presented by Will Moore (Maverick Outsource Services)

Reported by: Glenda Alvin (Brown-Daniel Library, Tennessee State University)  <galvin@tstate.edu>

eBooks will outsell print books this year, while the sales of tablets and e-readers are on the rise. Printed textbooks continue to be popular with students because of their re-sell value and the ability to highlight and personalize. The print format is a part of the culture of higher education, and there is a lack of adoption of titles in electronic format.

There are two models that would advance eTextbooks usage. Students could download a copy of the textbook when they register for their classes. Schools could also publish textbooks in electronic format. Keys for development of eTextbooks include: open source content, the ability to personalize with notes, inclusion of self-assessment, links to online tutors, links to real-time, as well as, access to video and audio. The increase use of mobile devices and tablets will facilitate the use of eTextbooks.

One site recommended to attendees was Flat World Knowledge that provides open and free textbooks (http://www.flatworldknowledge.com/). It allows faculty to create online textbooks.

Better than Google: Web-Scale Discovery Delivers  — Presented by Jeannie Castro (University of Houston); John McDonald (Claremont University Consortium)

Reported by: Wendy West (SUNY Albany)  <wwest@albany.edu>

**McDonald** began the presentation by giving a description of the HathiTrust. He went on to discuss the Consortium’s use of HathiTrust content, a study to look at the usage changes after the introduction of OpenURLs, legal issues related use of the HathiTrust content, and the possible using of HathiTrust as a de-selection tool. **Castro** spoke about University of Houston’s search for Web-scale discovery tool that would search across platforms, their decision to use Summon, and the implan-

continued on page 62

Against the Grain / April 2012  <http://www.against-the-grain.com>  61
tation of the tool as OneSearch on their libraries Webpage in 2010. Castro discussed the ease of implementation that they experienced, as well as some of the challenges they faced. In this project, the challenges that they experienced were post-implementation and were centered around data, particularly in shared instances. The findings of their usability team were discussed, and it was noted that evaluations are ongoing. A question and answer period followed the presentation.

**Mixing Oil and Water: Recipes for Press-Library Collaboration** — Presented by Patrick Alexander (Pennsylvania State University Press); James McCoy (University of Iowa Press); Leila Salisbury (University Press of Mississippi); Richard Brown (Georgetown University Press)

Reported by: Fred J. Hay, Ph.D. (Appalachian State University) <hayfj@appstate.edu>

Four university press directors discussed their experiences and ideas concerning library/press collaborations. All agreed that presses have recently and should continue to learn about IT and users’ preferences in how they receive information from libraries which have much more experience in this area. McCoy observed that presses are marginalized while libraries sit in the center of campus, that presses are looking inward to the campus, libraries are looking outward to the world, and Salisbury noted the tension between the presses’ “culture of creation” and the libraries’ “culture of acquisition” and that both must emphasize “selectivity.” Panel Moderator Alexander described Pennsylvania State University Press’s (which reports to the University Librarian) collaboration digitizing a collection of monographs; McCoy described a collaborative book fair. Brown was adamant that sustainable collaborations must be out of “self-interest,” identifying five requirements for successful collaborations: 1. Communication, identifying primary contacts in both organizations; 2. Articulating expectations at outset and periodically thereafter; 3. Identifying audience; 4. Financial projections: costs, staff, time, revenues; 5. Schedules: “collaborations should be obsessed with schedules,” and he added a sixth: “know when to quit.”

**Coming of Age: The Role that Digital Repositories Play in Scholarly Communication**

Charleston Observatory Research Project Number 3 — Presented by Ian Rowlands (CIBER Research); David Nicholas (CIBER Research)

NOTE: The title of the session was changed by the speakers to: “Coming of Age? Strategic Directions for Digital Repositories, Charleston Observatory 2011.”

Reported by: Kathleen Spring (Linfield College, Nicholson Library) <kspring@linfield.edu>

Rowlands and Nicholas had not seen any surveys asking fundamental questions about perceptions and impacts of digital repositories (DRs), including goals, success factors, and perceived benefits—hence their study, with the initial results presented in this session. The study’s first phase included data from an online survey of 153 library directors from a range of institutions (some without DRs). Rowlands presented the preliminary findings, which addressed is also were post-implementation and were centered around data, particularly in shared instances. The findings of their usability team were discussed, and it was noted that evaluations are ongoing. A question and answer period followed the presentation.

By Popular Demand: Building a Consortial Demand-Driven Program — Presented by Emily McElroy (Oregon Health & Science University); Xan Arch (Reed College); Robin Champieux (EBL – Ebook Library); Susan Hinken (University of Portland); Joan Thompson (YBP)

Reported by: Julie Blake (OhioLINK) <Julie@ohiolink.edu>

Presenters discussed a pilot project being conducted by the Orbis Cascade Alliance, YBP, and EBL to facilitate demand-driven acquisition of eBooks to be owned jointly by the members of the consortium. The group pursued this project based on the Alliance’s strategic agenda. They found the biggest hurdles to be in the areas of discovery and access. The majority of questions they receive from other consortia, however, are on financial matters. Advice and lessons learned included automating as much as possible in advance, involving the vendor from the beginning (vendor representatives sit on the implementation team and participate in listservs), remaining flexible, and communicating constantly. While the pilot is still underway, they are already noticing that member libraries with little previous experience with eBooks are becoming more comfortable with the format. However, they do recognize that more work remains to make the project sustainable for the long term. The project Website is http://www.orbiscascade.org/index/demand-driven-acquisitions-pilot for further information.

**New Tricks for Old Data Sources: Mashups, Visualizations, & Questions Your ILS Has Been Afraid to Answer**

Presented by Darby Orcutt (NCSU Libraries); John Vickery (NCSU Libraries); Brian Norberg (NCSU Libraries)

Reported by: Margaret M. Kain (University of Alabama at Birmingham, Mervyn H. Sterne Library) <pkain@uab.edu>

Orcutt, Vickery, and Norberg combined their technology savvy to demonstrate how to strategically use applications to analyze data and provide actionable results. Many of us still use the “old” tools, such as Excel and Access, to analyze data. These programs while useful are not as robust as some others that are available and user-friendly. SAS analytics software traditionally used by researchers in regression analysis was used in a “new” way that manipulated usage data using descriptive statistics. As pointed out, SAS has many advantages, by allowing the user to control how the data is used, the data can be read from any source, and the SAS software may already be available through your IT department on campus. This consolidated statistical analysis tool will bring data forward and make it dynamic. It provides a window showing use of data via multiple avenues, e.g., owned content, ILL. Also highlighted was an over-source application, Ruby on Rails, that does not require much technical expertise. The presenters utilized this application to create a usage tool to track monograph usage with a primary table and resource table, including ILL and ILS data.

**The Effect of the Earthquake and Tsunami on Libraries and the Conduct of Research and Publication in Japan** — Presented by Mikiko Tanifuji (National Institute for Materials Science, Tsukuba, Japan)

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

The two-part session provided the small but interested audience with an exposure to post-disaster response, as well as scholarly communication activities at a scientific research institute outside of North America. Tanifuji provided an overview (including photos) on the library response in the aftermath of the Japanese earthquake and tsunami. Her concluding remarks included a list of important activities for libraries: to ensure digitized formats,
to decentralize e-resources (through mirroring or collaborative hosting), to establish interoperability with other libraries, and to ensure access, through OA flexibility, depending on situations, for post-disaster time periods. Researchers want to return to their work after immediate post-disaster needs are addressed. Currently, efforts of international publisher disaster address medical responders’ clinical information needs but not those of researchers, whose livelihoods and professional lives are also affected by disasters.

You Ought to Be in Pictures: Bringing Streaming Video to Your Library — Presented by Cheri Duncan (James Madison Univ.); Erika Peterson (James Madison Univ.)

Reported by: Anne K. Abate (Library Discount Network) 
<anne@librarydiscountnetwork.com>

Beginning with a history of the introduction of streaming video at James Madison University, the speakers outlined the processing workflow for streaming media at their library including: selection, licensing and price negotiation, access, digitization and streaming, troubleshooting, hardware and software requirements, and evaluation of resources. They provided valuable details about their internal processes in each area. A highlight of the session was the description of internal digitization at James Madison with pictures of their equipment and how they cobbled together their technology to meet their needs. While the presentation closely matched the description in the conference program, there was no time remaining for sharing among the audience members, and the program fell apart at the end rather than concluding as people began to leave for the next sessions.

Free Is the Best Price: Building Your Collection of Primary Sources with Free, Online, Digital Collections — Presented by Joan Petit (Portland State University)

Reported by: Robert Weaver (Liberty University)  
<rweaver@liberty.edu>

Petit arranged the session as a guided group discussion in which the twenty or so attendees participated cheerfully. Petit began the discussion by asking a series of questions on the subject of online/digital libraries and encouraged the attendees to write down some answers to these questions:

How do we find them? How do we evaluate them? What problems do you have in finding? How do we share them with our users?

The bulk of the session was a free-flowing discussion of participants’ answers to these questions. Some of the ways of finding digital collections were by reading libguides at other libraries, particularly major research institutions, by searching listservs, by visiting state library sites, by doing subject searches in WorldCat using SU: database or SU: “Primary sources.” Evaluation criteria given included the organizer’s intent (is it commercial or academic?), the scholarship level (the target audience level), the persistence and freshness (how long has the site been up, how often is it updated or edited) and whether or not the site used commercial advertising. It was suggested that librarians collaborate with faculty to evaluate sites. There was little discussion of questions three and four; the attendees had so many collections to rate with faculty to evaluate sites. There was little discussion of commercial advertising. It was suggested that librarians collaborate on criteria given included the organizer’s intent (is it commercial or academic?), the scholarship level (the target audience level), the persistence and freshness (how long has the site been up, how often is it updated or edited) and whether or not the site used commercial advertising. It was suggested that librarians collaborate with faculty to evaluate sites. There was little discussion of questions three and four; the attendees had so many collections to rate with faculty to evaluate sites. There was little discussion of commercial advertising. It was suggested that librarians collaborate on

In summary, this session brought to light many resources previously unknown to this reviewer. Not all of the proposed questions were explored in depth, but the volume of free content to be explored made the session well-worth attending.

Against the Grain / April 2012

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

63

THURS., NOV. 3, 2011 – CONCURRENT SESSIONS 2

Give a Little Bit: Using Lean Tools to Create Efficiencies in Acquisitions and Beyond — Presented by Lisa Spagnolo (Acquisitions Librarian, University of California, Davis)

Reported by: Jill Crawley-Low (University Library, University of Saskatchewan) <jill.crawley@usask.ca>

This session was billed as providing enough information about process analysis tools to get started. Spagnolo explained how lean workflow theory has been adapted from companies such as Toyota to other types of workplaces including an academic library setting. She described how UC Davis acquisitions staff used swim lane maps for visual representations of accounting and acquisitions functions, identified key questions using the 5 why’s technique, and surveyed their customers to identify their needs. Practical points included the difficulty of collecting data, not just anecdotal information, the necessity of identifying quick wins and longer-term gains, and to expect resistance to change when it is implementation time. UC Davis staff had a consultant’s help to develop their transferable tool set, and I was on board with the session’s goal of teaching me enough process improvement to take back to my own library. That was until Lisa pointed to the wall hosting a five-foot-long paper function map of the credit-card ordering process covered with colored post-it notes! The lesson: acquisitions workflows are complex, and so is the process improvement methodology used to break them down.

Mobility Foresight 20/20: What can we say with certainty about scholarly communication in the 21st Century? — Presented by Michael Pelikan (Pennsylvania State University)

Reported by: Margaret M. Kain (University of Alabama at Birmingham, Mervyn H. Sterne Library)  <pkain@uab.edu>

Pelikan did not give the usual talk about mobile technology. Instead, his very entertaining presentation addressed the question of how mobile technology would intersect with scholarly communication in the 21st century. Libraries and vendor Websites are modeled after some physical structure, administrative structure, and/or vendor offerings. In doing so, many times we import problems from the physical or primary sites to mobile sites. For the consumer, the mobile site must be simple and easy to use. The librarian can be compared to the plumber; the magic is not in the device but on the backend. The type of information we are harvesting and preserving is rapidly changing. Libraries are moving toward a direction where less importance will be placed on the standalone article and more emphasis on the linked data. Data will be moved out of locked boxes and into open interactive formats, making it more accessible. Scholarly communication will have to react to a trend that moves toward finer granularity and machine-readable information.

What To Do About Data — Presented by Anthony Watkinson (University College London); Linda Beebe (American Psychological Association); Fiona Murphy (Wiley-Blackwell)

Reported by: Angharad Roberts (University of Sheffield, Information School)  <angharad.roberts@sheffield.ac.uk>

Watkinson began by observing that, at the time the session was being planned, there was no way of knowing that data would feature so prominently in the conference’s opening sessions. However, this excellent concurrent session provided a valuable complement to the earlier discussions of linked data and data practices. Watkinson emphasized that in order to be usable, data need to be well-constructed, and that means opportunities for librarians to be involved from the very start of the research process.

Murphy gave a useful overview of publisher perspectives on data projects, the motivations for improved data sharing, and the emerging data ecosystem of researchers, data centers, libraries, and publishers. Beebe discussed the progress of the NISO-NFAIS working groups on supplemental journal article materials. She described the challenges of dealing with supplemental materials, including managing, hosting, and preserving them, together with issues relating to improving discoverability, such as the importance of quality metadata and appropriate citation. The open discussion which followed suggested the potential value of case studies for librarians just beginning to engage with researchers about data issues, referring to the work of the UK’s Digital Curation Center, and suggested a greater role for institutional repositories.

That’s all the reports we have room for in this issue. Watch for more reports in upcoming issues of ATG. Presentation materials from many of the 2011 sessions are available online. Visit the Conference Website at www.katina.info/conference. — KS