And They Were There: Reports of Meetings

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**And They Were There**

**Reports of Meetings — 34th Annual Charleston Conference**

**Issues in Book and Serial Acquisition, “The Importance of Being Earnest”** — Francis Marion Hotel, Embassy Suites Historic Downtown, Courtyard Marriott Historic District, Addlestone Library, College of Charleston, and School of Science and Mathematics Building, Charleston, SC — November 5-8, 2014

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

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**Column Editor’s Note:** Thank you to all of the Charleston Conference attendees who agreed to write short reports that highlight sessions they attended at the 2014 conference. All attempts were made to provide a broad coverage of sessions, and notes are included in the reports to reflect known changes in the session titles or presenters, highlighting those that were not printed in the conference’s final program (though some may have been reflected in the online program).

Please visit the Conference Website, [http://www.katina.info/conference](http://www.katina.info/conference), for the online conference schedule from which there are links to many presentations, PowerPoint slides and handouts, plenary session videos, and conference reports by the 2014 Charleston Conference blogger, Donald T. Hawkins. Visit the conference blog at: [http://www.katina.info/conference/charleston-conference-blog](http://www.katina.info/conference/charleston-conference-blog). The 2014 Charleston Conference Proceedings will be published in partnership with Purdue University Press in 2015.

In this issue of ATG you will find the second installment of 2014 conference reports. The first installment can be found in ATG v.27#1, February 2015. We will continue to publish all of the reports received in upcoming print issues throughout the year. — RKK

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**THURSDAY, NOVEMBER 6, 2014**

**MORNING CONCURRENT SESSIONS**

**How Libraries Use Publisher Metadata Redux** — Presented by Steve Shadle (University of Washington Libraries)

Reported by: Rachel Walden (Student, University of South Carolina-Columbia) <rachellanewalden@gmail.com>

This session covered how libraries will use publisher metadata to provide and support access to electronic content. Case studies were presented, and examples from several publishers were highlighted. For this study the different user groups and their needs were determined. This was done by the use of personas. The five user groups were beginner, researcher, scholar, professional, and visitor. The beginner and researcher personas were focused on. The most important need for the beginner was ease of access and for the researcher to have current information and to be able to manage citations. Open link resolvers and library discovery services were discussed, and it was explained how they increase access. Libraries use open-URL link resolvers because navigating a library system is time consuming for the users; the resolver gets the user to the appropriate copy and also can provide alternate services if full text is not licensed by the library. Library discovery systems support “find” and “get.” Users are able to gain access to the materials right from the search results. There are two big problems with discovery metadata that comes from publishers. One is the issue of changing ISSN and titles for materials. When it doesn’t include the previous information the older materials will not be found with the newer. Also the problems of differing terms, such as “review,” is that a book review or a literature review is a research paper.

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**Improving the Library Research Skills of Graduate Students & Postdocs: Perspectives from a Librarian and a Former Postdoc** — Presented by Carol Feltes (Rockefeller University); Kinga Hosszu (Faculty of 1000)

Reported by: Ramona La Roche (Student, University of South Carolina-Columbia) <rlaroche@email.sc.edu>

Feltes (University Librarian Rockefeller University) and Hosszu (a former postdoc at Stony Brook University now working at F1000) shared their experience and insights.

Feltes described the Frits Markus Library, established 1904 and housed in the biomedical research university (Rockefeller University). The laboratory school consists of 75 labs. The educational program began in the 1950s, had its first Ph.D. graduates in 1959, and has birthed 24 Nobel Prize winners. Student composition is about 200 at any given time; twenty to thirty are accepted annually.

A students’ survey determined the ineffective utilization of the library by users, who in most cases were not aware of what they didn’t know. Medical researchers often believe that science/medical librarians cannot be of assistance to them. There is universal concern that students are not using more expensive research sources, but instead rely on Google Scholar, Google, Wikipedia, and PubMed.

Hosszu described graduate students, postdocs, and faculty as needing library portals with resources — funding, job search, fellowships, workshops info, thesis collections, writing, research, reviewers, teaching, emails, coursework, reference/citation management, deadlines, standardized institutional Web design, personalized subject-specific library resources, chat services interfaced with research, etc.

Libraries should provide rotational classes, online streaming of literature recommendation software, metrics, data analytics, OA, publishing, and collaboration tools such as Google docs, Github, and predatory journals. If library staff is limited vendors, grants management and writing centers can teach graduate credited courses.

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**Just a Click Away: One Academic Library’s Experience with Patron-driven Streaming Video Licensing Thread** — Presented by Anita Foster (Illinois State University); Anne Shelley (Illinois State University)

Reported by: Cheryl Aine Morrison (University of Washington) <ehradin@u.washington.edu>

Based on the success of their electronic patron-driven acquisition (PDA) program, and the growing demand for streaming media, the Milner Library, at Illinois State University, decided to embark on a pilot project with Kanopy, a distributor of online education media, to test a streaming media on-demand licensing service. Foster (Head, Acquisitions and Electronic Resources Unit) began with a brief introduction of the institution and the patrons they serve as well as an overview on the eBook PDA program. She then outlined the challenges.
faced with their current streaming and physical media options, particularly self-hosted material. She then gave a brief introduction of the pilot program. Shelley (Music and Multimedia Services Librarian) gave more details about the program including licensing term options, provision of MARC records, and discovery options. She discussed their marketing campaign and the very positive reaction from faculty and students. Then she covered some of the problems discovered in the first few months of the program, including the confusion caused by titles discoverable on the Kanopy launch page, which are not available for PDA licensing. So far they are very happy with the program, although they did concede that its popularity may create budget concerns at some point in the future.

The representatives from the companies and Willamette University Library discussed the many benefits which have occurred because of this update in software that was tested. The process for acquiring items through Alma for the librarians was cut from seven steps to only three, and whereas before a person was forced to wait till a set time the next day to access the items and for them to appear in a library’s system, it is now automatic. The delay was especially problematic for libraries in other parts of the world, like Australia. However, while the new system update does correct many problems, there are still a few issues that need correcting. The main issue the librarian from Willamette University found was in the entering of codes. Because many universities and locations have similar names or abbreviations, the librarian sometimes would not be able to retrieve the desired items at first. Overall, the panel provided an excellent session, offering the audience plenty of time to ask questions, and while the panel was not able to speak on how larger universities in the study handled the changes, the information was offered.

Successful E-Resource Acquisitions: Looking Beyond Selecting, Ordering, Paying and Receiving to Discovery and Access — Presented by Denise Branch (Virginia Commonwealth University)

Reported by: Matthew Whitney Haney (Student, University of South Carolina-Columbia) <mhaney@email.sc.edu>

You Got Surveyed! Real-time Polling on the Landscape of Use-Driven Acquisition — Presented by Erin Gallagher (Rollins College); Michelle Leonard (University of Florida)

Reported by: Julia Blake (Franklin University Nationwide University) <julia.blake@franklin.edu>

Gallagher and Leonard are in the process of writing a book on what’s happening in use-driven acquisition (UDA), and used the session to follow up on their widespread survey from summer, 2014. The session took advantage of Poll Everywhere real-time polling software to engage the audience, who could respond to questions anonymously via a Web browser or text. Questions and discussions ranged from how many types of UDA are being implemented or offered to how they might be publicized and managed.

50 Shades of Grey and Beyond: The Impact of Popular Culture on Collection Development. Do Traditional Methods of Building Collections Bring These Materials in or Filter Them Out? — Presented by Genya O’Gara (James Madison University); Joyce Skokut (Ingram/Coutts); Pam MacKintosh (University of Michigan)

Reported by: Rebecca Wingfield (Stanford University Libraries) <wingfiel@stanford.edu>

Skokut (the Director of Collection Development at Coutts), opened the panel by encouraging dialogue and questions from the audience, which made for a lively discussion. Skokut provided an overview how Coutts treats popular culture titles on approval and noted some of the useful geographic metadata that can be applied to popular culture content. O’Gara (the Director of Collections at James Madison University) discussed some of the challenges of collecting popular culture for libraries whose collecting profiles are strongly oriented toward curricular and research needs. MacKintosh (Economics Librarian and Coordinator, Shapiro Library Reference Services, University of Michigan) concluded the program by discussing how popular culture is selected for the undergraduate library at the University of Michigan by a cohort of selectors and the balancing act between collecting popular culture and providing materials that provide curricular support. This panel provoked an interesting discussion among audience members and the panelists about some of the major challenges of collecting popular culture and provided a glimpse into the popular culture collecting practices at a range of libraries, from community college libraries to major research university libraries.

Do Libraries’ Needs Still Match Publisher Offerings? “The Truth is Rarely Pure and Never Simple” (Oscar Wilde) — Presented by Nadia J. Lalla (University of Michigan); Don West (ACCUCOMS); John Banonis (ACCUCOMS)

Reported by: Oriana Bedolla (Student, University of South Carolina-Columbia) <bedolla@email.sc.edu>

True to the title, the panel of this discussion offered an informative and detailed look at the current state of the relationship between publisher offerings and the needs of libraries. Many different issues were outlined including those related to users and lease versus ownership of materials. The panel concluded with a question-and-answer segment regarding the aforementioned issues as well as possibilities for a new e-resources acquisitions model which sparked dynamic debate. Many questions were raised regarding the possibility of a new acquisitions model including the feasibility of incorporating journals and eBooks
Guided Encounters: Mapping Content Strategies — Presented by Gail Yokote, Moderator (University of California, Davis); Lenny Allen (Oxford University Press); Kittie Henderson (EBSCO Information Services); Jan Maxwell (Ohio State University); Myra Appel (University of California, Davis)

Yokote introduced the session, observing that a desirable aim is to collect data that has context. There are issues, and this requires strategies. At her institution and that of Appel, who went into more detail, a massive reorganization created a Collection Strategies Department that incorporates all subjects and locations (including Archives and Special Collections). Evidence-based assessment, evaluation, management are quantitative and qualitative. Available data is more transparently available to liaisons and collected centrally from vendors. Allen shared the publisher’s interest in data of the costs variety — digital publishing costs that are the same and different from print, the “wrenches” (challenges) that DDA and short-term loans create trying to do three-year profit analyses. Henderson talked about the ecosystem of scholarly publishing and the analyses that EBSCO has done surveying academic libraries and publishing partners. Results reflect the journey (transitional phase), diverse needs. “Build services in advance of needs,” she advised. Maxwell, new as a collection strategist, overviewed what is in place at OSU: a strategic plan, quarterly collection progress reviews. Without a doubt, consortia change how libraries do business. There are politics to decisions, and the math has to be done. Libraries are part of a whole, but still produce knowledge locally (oa) vs. OA (the cost of which OSU is studying). Yokote jumpstarted discussion by opining that institutions should reinvision archives to incorporate the whole careers of researchers, from graduate school to faculty, to transferring elsewhere. Repositories should be developed to meet needs. Productive metrics should be retrievable at individual, department, school level. As for the discovery end, attendees shared that the discovery of an item vs. content is different.

How to Handle Article Processing Charges — Presented by Anthony Watkinson, Moderator (CIBER Research); Simon Thomson (Open Access Key); Barbara DeFelice (Dartmouth College); Patty Gallilee (Simon Fraser University); Jennifer Goodrich (Copyright Clearance Center)

Watkinson indicated that a session had been proposed with this title, but the primary speaker withdrew. The (conference) directors chose to invite panel members from a variety of stakeholders, under the same (initial session) title. Gallilee described her mid-sized institution’s Open Access (OA) fund and its growth. SFU’s authors collaborate with those at a large institution with no OA fund, which may increase SFU’s costs. DeFelice’s fund is small-scale. She finds that the service opens conversations with others on campus. The fund is part of their suite of OA supports. Thomson discussed OAK, a platform to manage APC payments. One time-motion study indicated the cost to process an APC was $150. OAK makes the work more efficient for institutions and for authors, to encourage authors to publish OA again. OAK is used by 240 institutions in 68 countries, mainly in Europe and the U.S. Goodrich reported on an October roundtable of leading UK universities, Jisc, and publishers. Both institutions and publishers shared the same issues: the need to standardize OA policies and licenses, harmonize vocabulary and identifiers, simplify processes, make activities sustainable and scalable, preserve academic freedom and author choice, and make research valuable for the user.

Selectors of the Future: What Should (or Can) They Learn in an MLIS Program? — Presented by Helene Williams (University of Washington Information School)

Reported by: Rachel Walden (Student, University of South Carolina-Columbia) <rachellanewalden@gmail.com>

This session covered the curriculum for one collection development course and welcomed feedback on how to improve it so the students will be prepared for the career field. Reality-based teaching was core of the class with sufficient background knowledge of collection development thrown in. Many different aspects of collection development are taught including policies, approval plans, acquisition process, budgeting and finance, working and negotiating with vendors, selection and workflows, liaison work, and consortial and collaborative collection development. The class also does not focus entirely on books and teaches all aspects of collections including e-resources, which so many other programs don’t do. The feedback from the students is that having an end product of building a collection for a work setting really enhances what they have learned and allows them to apply it. The participants in the session described the library as a business or a factory and that all the pieces have to fit and work together. Having new professionals who are capable of and have experience interacting successfully with vendors, faculty, and other staff is very important when they are looking for new employees. Collection development is a group effort, and no one person will be able to do it in a vacuum.

THURSDAY, NOVEMBER 6, 2014
CONCURRENT SESSIONS 1

Are We There Yet? A Longitudinal Study of the Student E-Book Experience — Presented by Kendall Hobbs (Wesleyan University); Diane Klare (Wesleyan University)

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

This session featured Hobbs (Interim Head of Reference, Wesleyan University) and Klare (Interim University Librarian, Wesleyan University) reporting on the results of a study of student use of eBooks that was conducted at Connecticut College, Wesleyan University, and Trinity College. This four-year longitudinal investigation was a qualitative study including interviews, usability studies, and usage statistics for students to reveal how they use eBooks. The investigators attempted to do the research in a non-leading manner in order to get real answers from the students. The questions were: What is an eBook?; Have you used one?; Can you find an eBook? Use this ebrary book?: Use this Ingram MyLibrary book?: What do you see as the future of eBooks? The results proved that more students are using eBooks than four years ago, but pretty much in the same way. Students are not really using advanced features of eBooks. Laptops are the most frequent access tool. Students still prefer print for both academic and leisure reading. When asked about the future, students were hoping for more integrated content and collaboration tools. The session description provided an accurate summary of the results that were detailed in the presentation.
Engrossed, Enraged, Engaged: Empowering Faculty in Transforming Scholarly Communication — Presented by Jen Waller (Miami University); Jennifer Bazeley (Miami University Libraries)

It is always nice to hear that an academic library is able to plug into an initiative that is already in place on campus and recognized by faculty as a strategic endeavor in which to be involved. At Miami University, the library’s attempts to involve the academic community in scholarly communication discussions, esp. on OA, through its 2009 Scholarly Working Group, did not lead to adoption of an OA resolution. However, since 2011, involvement in several of the university’s trans-disciplinary Faculty Learning Communities has proven to be more successful on various levels. Administrative support, a stipend for continuing education, and recognition in the tenure process were likely factors leading to buy-in by the individuals (faculty and students) who applied to join. Librarians’ successfully accepted FLCs, with their “set” curricula and objectives, have focused on information literacy and OA. Output products have included conferences and journals. Members were engaged in topics such as journal costs, author rights, open peer review. They could be enraged when given examples (or underwent personal experience) of unexpected results with OA editors. They were engaged since discussions were member-facilitated. The groups broke down silos, were of varied demographics. Faculty members are interested in promotion and tenure (their behaviors could change). The library’s status on campus increased. Library involvement in FLCs so far has had success and has necessitated re-evaluation of activities if too advanced or too ambitious.
they will assist faculty, make textbooks more affordable to students, and help change the marketplace of textbooks.

By creating partnerships with faculty and obtaining grants to assist with costs of textbook creation, the library can assist with better quality textbooks at a more reasonable cost. I was not aware, until this session, that there are currently monies available in grants to assist libraries and faculty with this endeavor. However, I hope to bring up this, and the topic of textbooks in general, to my library in the hopes we can explore some of these cutting edge ideas.

One System, Different Expectations: The User at the Center of Discovery — Presented by Christine Stohn (Ex Libris); Laura Morse (Harvard University)

One main reason to do user studies is that users come to a search with different expectations. Stohn began the presentation by explaining user and usability studies, and how libraries can use these to provide more effective searching for their patrons. Ex Libris collaborated with Harvard over the past year to collect usage scenarios and feedback from users. Morse explained how this data helped Harvard create personas and scenarios in order to optimize searching in their discovery service. Several recurring themes appeared in the studies, including a need for students to build up their terminology on a subject, and a desire among faculty members and researchers for the newest material in their field.

Out of the Basement: Impact of Video on New Library Resources and Library Collections and Services — Presented by Julia Gelfand (University of California, Irvine); Eileen Lawrence (Alexander Street Press); Howard Burton (Ideas Roadshow/Open Agenda Publishing); Michael Fusco (JoVE)

Gelfand began the session, stating that her library has been working to develop their video support for science and engineering. She mentions reasons for this initiative, including, but not limited to, the fact that users are interested in using video for teaching and learning, there are many new products on the market now, video brings extra interaction and expression to one’s learning experience, and students are more and more creating their own academic work in the form of video. With these enhanced services, though, the library has also confronted a number of issues, such as streaming, a variety of formats to manage, and device compatibility.

Fusco spoke about JoVE’s role in helping students engage with scientific experiments through video. He presented a number of case studies and data that demonstrated the effectiveness of learning through video in both the corporate and academic sectors.

Burton spoke about using video for enhancement. He deliberately wanted video content in Ideas Roadshow to emphasize conversations and pedagogical goals, and much of their product consists of academic interviews between himself and a researcher. He explored three examples of this “deliberate enhancement”: providing a motivational and contextual environment for “humanizing” researchers, demonstrating interdisciplinarity, and revealing new insights and perspectives through informal conversation.

After providing a brief history of Alexander Street Press, Lawrence spoke about her company’s focus on added-value tools that they develop and provide along with their content. She spoke about different models of licensing streaming video, from the traditional (annual subject-based package subscriptions) to the emerging (evidence-based, PDA, perpetual rights, single title, topical bundles), some of which ASP will be offering in 2015.

Two Years In and We Are Still Head Over Heels about Our Head in the Clouds: 100% PDA and No Approval Plan — Presented by Jennifer Clarke (Bucknell University); Dan Heuer (Bucknell University)

Two years in, and Bucknell is still extremely pleased with the results of their move from approval plans to a 100% patron-driven approach to selection and acquisitions. Bucknell is the largest private liberal arts college in central Pennsylvania and uses OCLC’s WorldCat as their discovery service. Bucknell’s approval plan process was efficient, adding roughly 12,000 titles per year to their collections, but Clarke and Heuer found that only titles “rush” ordered or from a specific request were actually being used. Bucknell’s patron-driven plan provides a two-pronged approach: over 200,000 bibliographic records were loaded into their catalog based upon a profile using subjects and costs as parameters. These titles were available for browsing, short-term loans, or purchases. If a needed title was not available through this plan or as part of existing collections, the title was borrowed or purchased through a mediated request form via Illiad. This new approach resulted in a 73% reduction in titles ordered from 2012-2014 and a 75% reduction in monies spent although concerns persist about the rising costs of short-term loans. The reduction in staff time needed for selection and acquisition resulted in new metadata responsibilities for technical services staff, and public services staff had more time to spend embedded in classes. A new digital humanities position was created. Bucknell is in the process of joining HathiTrust, continues to weed their collections, and plans a major deselection project in the future. Saved monies were used to purchase primary source materials, journal backfiles, and materials for Special Collections. This presentation did not address textbooks.

That’s all the reports we have room for in this issue. Watch for more reports from the 2014 Charleston Conference in upcoming issues of Against the Grain. Presentation material (PowerPoint slides, handouts) and taped session links from many of the 2014 sessions are available online. Visit the Conference Website at www.katina.info/conference. — KS

Rumors from page 48

http://www.wsj.com
https://www.insidehighered.com

The Springer and Macmillan potential merger was discussed in detail in Scholarly Kitchen by Kent Anderson January 20, 2015.

It is unclear when or if the merger will be approved. The final sentence of the SK editorial is worth repeating, “Scale is the new normal, and those without some element of scale to their business may soon find themselves with few options.”

http://scholarlykitchen.sspnet.org

Given all this consolidation in the industry, several articles on the ATG NewsChannel by the perceptive Nancy Herther are worth reading. Google Deals & Privacy: What Have We Been Sold? (Part 1 of 2 Parts). Mastering the Curation, Integrity and Citation of Quality Research Data: Research Data Publication, Part II. http://www.against-the-grain.com

Thank goodness it is Spring even though it means that the heat will return to Charleston! Happy Spring! Yr. Ed. 