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And They Were There -- Reports of Meetings -- 28th Annual Charleston Conference, Issues in Book and Serial Acquisition, "The Best of Time.. The Worst of Times," Francis Marion Hotel, Embassy Suites Historic District, and College of Charleston (Addlestone Library), Charleston, SC, November 5-8, 2008

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And They Were There — Reports of Meetings —

28th Annual Charleston Conference, Issues in Book and Serial Acquisition, “The Best of Times ... The Worst of Times,” Francis Marion Hotel, Embassy Suites Historic District, and College of Charleston (Addlestone Library), Charleston, SC, November 5-8, 2008

Charleston Conference Reports compiled by: **Ramune K. Kubilius** (Collection Development / Special Projects Librarian, Northwestern University, Galter Health Sciences Library) <r-kubilius@northwestern.edu>

Column Editor's Note: Thank you to all of the conference attendees who volunteered to become reporters, providing highlights of so many conference sessions. In this issue, we are providing the fourth installment of reports. Visit the **Charleston Conference Website** for reports that have not been published yet, as well as handouts and presentation outlines from many conference sessions. The **2008 Charleston Conference Proceedings** will be available this fall. — **RKK**

Lively Lunches — Friday, November 7, 2008 continued

Facing Hard Times: A Briefing on Scholarly Communications — Presented by **Julia Blixrud** (Assistant Executive Director, External Relations, ARL, & Assistant Director, Public Programs, SPARC, Association for Research Libraries (ARL)); **Molly Keener** (Reference Librarian, Wake Forest University Health Sciences, Coy C. Carpenter Library); **Cheryl S. McCoy** (University Librarian, Natural Sciences / Government Documents, University of South Florida); **Ramune K. Kubilius, Moderator** (Collection Development / Special Projects Librarian, Northwestern University, Galter Health Sciences Library)

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

Thursday and Friday lunchtime scholarly communication discussions approached the topic differently. In Friday's session, moderator **Kubilius** shared definitions, activities, and job description fragments that might fall under the “scholarly communication” umbrella. **Blixrud** provided an overview on life cycle management issues surrounding the “stuff” (documents, texts, other) being created; the structures and services for dealing with them, the people (“us” and “them”) experiencing changing jobs. Libraries need to know institutional cultures — we go out and “get stuff,” or lead users to it. Institutional, national, world-wide policies will shape access. Take advantage of organizations’ (ACRL, SPARC, etc.) sites, toolkits, training (many were in **McCoy**’s handout). **McCoy** shared her experience in state-wide (11 universities’) initiatives addressing **Janus Conference Challenge Six**, on scholarly communication. She chaired a group that communicated virtually, coordinating statements on a mission, plans, and activities. Perhaps a Florida digital library will be the next step? **Keener** discussed her institution’s strategies and activities: campus-wide scholarly communication committee, education of library staff, liaison librarian involvement, and partnering with research offices who refer publication-end questions to the library. **NIH Public Access Policy** support is essential, not only for biomedical authors. A library-sponsored workshop was warranted with implementation of electronic theses and dissertations, then a move towards an institutional repository. Curious attendees asked how much of **Keener**’s day is spent on the activities she described. Reply: 40-60%.

Tossing Traditional Collection Development Practices for Patron Initiated Purchasing: A Debate — Presented by **Sue Polanka** (Head, Reference/ Instruction, Wright State University Library); **Alice Crosetto** (Assistant Professor of Library Administration; Coordinator, Collection Development; Acquisitions Librarian; Carlson Library, University of Toledo); **Michelle Harper** (Global Product Manager, NetLibrary)

Reported by: **Kristine E. Mudrick** (Francis A. Drexel Library, Saint Joseph's University) <kmudrick@sju.edu>

Polanka, Crosetto and **Harper** delivered a lively presentation on “patron-initiated purchasing,” where patrons decide what will be added to a library collection. Recording answers to several questions using clickers and immediately presenting the results engaged the audience and fostered discussion. **Polanka** and **Crosetto** presented from the perspectives of a library where eBooks are popular and of a second where they aren't, demonstrating that what works for one library may not work for another. **Harper** provided an overview of patron-driven acquisitions and described **OCLC's NetLibrary** as an example of eBook content delivered effectively and at reasonable cost. Librarians need to recognize the needs and preferences of their patrons and their institution's curriculum. They need to be willing to relinquish at least some control of purchasing to patrons who may not be subject experts and who may not be interested in the overall development of the library collection. Patron-initiated purchasing can be managed like approval plans; purchasing profiles can be refined and funds distributed. Buying books at the point of need means that these books will definitely circulate and instant delivery increases patron satisfaction but this method would likely not be used as a single solution for collection development.

Usage Statistics: Best Practices and Practical Applications from a Librarian's Perspective — Presented by **Cory Tucker** (Head, Collection Management, UNLV); **Bonnie Tijerina** (Digital Collection Services Librarian, UCLA); **John McDonald** (Director, Information & Bibliographic Management and Faculty Relations, Libraries, Claremont University Consortium); **Virginia Kinman** (Electronic Resources Librarian, Longwood University)

Reported by: **Susan L. Kendall** (Dr. Martin Luther King, Jr. Library, San Jose State University) <susan.kendall@sjsu.edu>

This standing room only session featured a dynamic panel. **Tijerina** from **UCLA** moderated the panel. **McDonald** gave an overview of the **COUNTER 3** release implications. New reports include statistics on full text article requests by month and year. There are also new features in consortia reports and in specifications of report delivery. **Counter 3** will include auditing certification for database vendors. **SUSHI** is now a requirement for compliance. Future issues include new media materials compliance; new communities.

Tucker demonstrated a program on usage statistics for budget justification which in turn assists in strategic planning projects. The result has been improved marketing of databases to faculty and students and giving feedback to vendors. **Cory** reported on the workflow the department follows in collecting the statistics. Reports on costs per search and full text views are written and the reports are then sent to the provost twice a year.

Kinman reported that her university has a smaller student population. Instead of using a commercially produced ERM, they developed a **Microsoft ACCESS** program to track trends and uses. **Virginia** suggested that the electronic librarian wiki <http://www.electroniclibrarian.org/erlwiki> has a portal on best practices on usage statistics.

Walking the Usage Tightrope: Publishers and Librarians Explore the Delicate Balancing Act between E-Content Usability and Intellectual Property Protection — Presented by **Jackie Zanghi-LaPlaca** (Director of Electronic Databases, IGI Global); **Jim Dooley** (Head, Collection Services, University of California, Merced); **Kirstin Steele** (Head of Collection Management, Citadel); **Selden Durgom Lamoureux** (Electronic Resources Librarian, North Carolina State University Libraries)

Reported by: **Ann Marie Miller** (SLIS Student, University of South Carolina) <annmarie.miller@gmail.com>

Breaches of security, licensing agreements, and how they are accidentally violated, were the topics of this session. There is a balance between usability versus security. (A lot of the presentation was rather technical and I can't say that I understood the entire thing, as someone who is just entering the profession.) Most of the session time was spent in the audience asking questions of the librarians who were in charge of the session. It becomes an issue, that while libraries want to make sure the system is usable, users often don't understand what types of usage violate the intellectual property rights of the creators. A lot of the questions presented scenarios where someone had violated intellectual property rights and was dealt with, and the problems that result when an entire service is taken away because of the actions of a single user.

Observing Faculty and Graduate Students Using Journal Literature: A View from the Field — Presented by **Helen Anderson** (Head, Collection Development, University of Rochester); **Katie Clark** (Associate Dean, Public Services and Collection Development; University of Rochester)

Reported by: **Amelia Glawe** (SLIS Student, University of South Carolina) <GLAWEA@mailbox.sc.edu>

Anderson and **Clark** discussed their findings during a study of the search and usage of journal articles among college graduate students and faculty. During this study, the researchers, with the help of an anthropologist, reviewed transcripts of a series of videotaped interviews conducted in connection with two grant funded projects at the **University of Rochester**. During their studies, the researchers found that graduate

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students were admittedly not confident searchers, whereas members of the faculty were very confident with their search technique. Graduate students tended to save or print every article they thought may be important whereas faculty rarely printed or saved articles. Graduate students expressed a tendency to search authors and/or journals suggested by faculty. Faculty also expressed a familiarity with authors and journals that could be reason for their heightened confidence with library searches. Overall, **Anderson** and **Clark** discovered large differences between the searching and usage techniques of graduate students and faculty members.

Concurrent Sessions 1 — Friday, November 7, 2008

'Tis a Far, Far Better Thing... Maybe: Electronic Selection in a Multi-Vendor Environment — Presented by **Dianne Keeping** (Collection Development Librarian, Social Sciences, Memorial University Libraries); **Lisa Goddard** (Division Head for Systems; Memorial University Libraries)

Reported by: **Rita M. Cauce** (Florida International University, Green Library) <caucer@fiu.edu>

Memorial University Libraries was one of the first adopters of **OCLC's** new **WorldCat Selection** with 9xx/EDI. The presenters outlined the work they did leading to the decision to implement this new system, describing the procedure from a completely paper-based monograph acquisitions workflow to a largely electronic environment. **WorldCat Selection** interface was also demonstrated in detail.

Memorial University Libraries spend approximately \$1.5 million annually in monograph acquisitions. They do not have a major approval plan. They received paper slips from three large vendors (**Blackwell**, **Coutts**, **YBP**), plus others, resulting in over 150,000 slips per year. These slip notifications had to be sorted manually, routed to faculty through campus mail, checked manually in the library's catalog for duplication, orders were created manually in the ILS, and then invoices were entered twice: first in the ILS and then in the university's financial system, **Banner**. The calculated data was re-keyed about nine times during the paper-based acquisitions workflow. An EDI Steering Committee was put together consisting of members from Systems, Collections, Acquisitions, Cataloging, and Administration. The ideal situation was to be able to view title notices from multiple vendors in one system. The solution: **WorldCat Selection**. **WorldCat Selection** allows selectors to view multi-

vendor slips in one place, allows selectors to view colleague's selections reducing duplications, provides **OCLC** MARC records for loading at point of order, and alerts to duplicate slips. Invoices are also loaded electronically and a cross-walk allows this information to be fed into the **Banner** financial system. Conclusion: electronic selection is much better for selectors and acquisitions, although there are some bugs as it is still a new product.

Monographs in the Age of Mass Digitization — Presented by **Robert H. McDonald** (Associate Dean for Library Technologies, Indiana University); **Dana Sally** (Dean of Library Services, Western Carolina University); **Heath Martin** (Collection Development Librarian, Western Carolina University); **Amy Miller**, **New Speaker** (Ingram Digital)

Reported by: **Audrey Powers** (Univ. of South Florida) <apowers@lib.usf.edu>

This session included many thought-provoking aspects regarding print content being transformed digitally. The audience was inspired to think about the monograph as a concept that can be produced in many ways. A comparison of the process and development of print to the process and development of digitization was given to point out that they all perform the same function; to store, preserve and distribute content. Essentially, print equals digital and vice versa; thus, print content must be digitized and digital materials must be printed. With the capability of global print on demand, collections can be exposed and content preserved. Digitization initiatives are in their infancy, however, access and delivery of content and in any and all ways is an important task to accomplish.

China: Market Contours and Opportunities — Presented by **Greg Tananbaum** (Consultant, ScholarNext); **Boe Horton** (Senior Vice President of Research Solutions, ProQuest)

Reported by: **Cordelia Wilson** (SLIS Student, University of South Carolina) <Wilsons29209@aol.com>

Tananbaum provided an overview of developing trends in China's market. China has invested heavily in its academic sector resulting in dramatic increases in the number of universities, college students and university faculty. Encouraged by Chinese governmental incentives, its scholars have published a large number of papers

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in Western journals. Yet, the research, in proportion to its quantity, is not frequently cited by Western scholars. **Tananbaum** examined barriers that may be limiting the influence of Chinese scholarship and presented his original study on the perceptions of Chinese academics regarding the Western reception of their research. He concluded that Western publishers and information providers should be seeking ways to tap into the enormous potential of the growing Chinese academic market.

Horton discussed how the cultural influence of Confucianism can be seen in Chinese business protocol, especially in the concepts of face (*mianzi*) and connections (*guanxi*). Specifically, he addressed in detail the dos and taboos in handling business cards and attending or hosting a Chinese banquet. He ended by briefly speaking about the electronic journal publishing environment in the country and the active role that **ProQuest** has been playing in the Chinese information market for over a decade.

Retrospective Titles: Verification and Online Access — Presented by
Charles F. Hillen (Head, Monograph Acquisitions and Metadata Services,
The Getty Research Institute); **Ann J. Roll** (Acquisitions Librarian,
The Getty Research Institute)

Reported by: **Kelly Smith** (Eastern Kentucky University Libraries)
<kelly.smith2@eku.edu>

Hillen and **Roll** presented their process for pre-order verification of online availability of retrospective titles. The library focuses on the history of art, architecture, and archaeology, and relevant materials in the humanities and social sciences. The collection currently includes over a million secondary source volumes, including books, periodicals, and auction catalogs. The collections' scope ranges from prehistory to contemporary art with a focus on Western Europe, but is expanding to include Latin America, Eastern Europe, and Asia. They also house a unique conservation collection, a photo study collection, institutional records and archives, and special collections.

With no date or language restrictions, selection and acquisition can be challenging. The **Getty Library** has 12 approval plans in addition to firm orders and fulfillment of researcher requests. They employ the **OCLC WorldCat Selection** service. Staffing in Collection Development includes two bibliographers and one fulltime assistant. Acquisitions has six FTE staff including one supervisor, two working on firm orders, and three in receiving.

When a retrospective request is received, staff members have four options for locating the materials: vendor selection tools; online secondhand booksellers, free digitized versions on the open Web, and **OCLC**. They start by searching for open access versions, beginning with the **Internet Archive** (www.archive.org), a repository of public domain digitized material to which the **Getty** also contributes content. The presenters cited as a recent example a rush order for a French Title published in 1887 that would have been difficult to obtain in print — they found it in the **Internet Archive**. They also maintain a list of publishers and libraries that offer free digitized versions such as **eScholarship** (escholarship.cdlib.org) and **Gutenberg-e** (www.gutenberg-e.org). Finally, they search grey literature and individual small publishers, a step which is particularly helpful in locating materials for the conservation collection. They will consider adding more sites to their verification process over time, but will carefully assess the potential for pay-off. Sites like **Gutenberg-e** don't have a lot of content yet.

According to the presenters, "While library vendors are centralizing the purchase of eBooks that are available through major distributors, there is no centralized location in which to locate free materials."

Vendors are unlikely to take on this task because there is nothing to sell. They are trying to encourage vendors to consider developing such an aggregating service, for which libraries may be willing to pay to save staff time. At one point, the **Digital Library Federation** had an idea for a **Registry of Digital Masters (RDM)** that would be a "one stop shop for Institutional Repositories." They were unable to find a host for the registry. **OCLC** is currently housing some records for these.

Currently, we have to balance cash flow (i.e., free access) with cost-benefit (i.e., staff time to search for free access). At this point, the **Getty Library** thinks that the experiment is worth the trouble. It is arguable that staff time is wasted because, for them, the full gamut of research, ordering, payment, and receiving, is much more time consuming and costly. However, because of the pre-order search and discovery process, patrons and staff have reacted positively when notified that free online access to a requested title was located. Some libraries may be uncomfortable with linking to things they don't own. But librarians of the future will increasingly need to be concerned with mediating access over maintaining ownership.

Return on Investment of Academic Library E-Journal Collections: A Study of ROI in Grant Writing — Presented by **Carol Tenopir** (Professor, University of Tennessee); **Tina Chrzastowski** (Chemistry Librarian, University of Illinois); **Judy Luther** (President, Informed Strategies (Note: **Michael Kurtz** (Astronomer, Harvard-Smithsonian Center for Astrophysics), was incorrectly listed as being a presenter in this session — he spoke in a Thursday session.)

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

Phase I of an **Elsevier** "Library Connect" program was described. (Copies of the related white paper #1, "University investment in the library: What's the return? A case study at the University of Illinois at Urbana-Champaign," authored by **Luther**, were distributed and can be found at: www.elsevier.com/wps/find/librarianshome.librarians/whitepapers). **Luther** discussed points of interest — the quantity of a university's investment in its library, with a focus on the library's role. **Roger Strouse** published on ROI in *Information Outlook* (March 2003, "Demonstrating Value and Return on Investment: The Ongoing Imperative"). **Chrzastowski** spoke about her library's experiences, (representing the director) as one of the "village people," since "It takes a village." She commented on some outcomes ("references are vital to grants"), and emphasized that library budget figures, not the acquisitions portion, were required. One poignant surveyed faculty member comment: "I would leave this university if the library deteriorated to the point that I'm not competitive." **Tenopir** explained that Phase 2 extends across universities (each participating institution gets its own report), brings in more libraries, identified through **Elsevier's** representatives in various countries. Questions to be answered — does the survey work internationally, is it scalable, and will it meet the needs of provosts — can it be used as a budget argument? Some libraries, although willing, were unable to participate, if unable to provide the retrospective ten years of budget data.

The Charleston Conference Observatory – A Proposal — Presented by
David Nicholas (Professor, University College London)

Reported by: **Heather Miller** (SUNY Albany)
<h-miller@uamail.albany.edu>

Nicholas urged the creation of a research adjunct to the conference where the best ideas from each conference could become research projects, developing an evidence base for strategic planning and informing future conference agendas and, consequently, becoming a major policy maker and influence in the field. It is an opportunity to build an international, interdisciplinary, common research community. He emphasized the need for large scale, longitudinal, comparative, strategic studies. Examples in the UK include **The EBook National Observatory**, a journal impact study and a **Google Generation** study. He noted that librarians are not natural researchers, but also pointed to these UK projects as sources of guidance. One question that should be asked is whether journal packages affect research outcomes and, consequently, what is the effect of a given price increase? In answer to questions, he noted that in order to do this, leaders are needed from richer institutions who can contribute time and money. Funding can come after a small start. **Derek Law** pointed out that detailed case studies are also valuable and that the whole world is not represented at Charleston. It was suggested to see if research ideas could be collected via a wiki.

Academic Libraries in Sichuan, China: After the Quake — Presented by
Tony Ferguson (University Librarian, University of Hong Kong)

Reported by: **Karla Chavois** (SLIS Student, University of South Carolina)
<selahcat33@gmail.com>

Books without homes, homes without books — this is the fate that libraries hope to avoid following the May 12, 2008 earthquakes that claimed thousands of lives and destroyed areas of China. Session speaker **Ferguson** described and showed some of the devastating effects of the earthquakes which left so many homeless, injured, orphaned, or otherwise affected. Slides of collapsed structures, libraries, and even tents as temporary staff quarters were pictured. **Ferguson** also discussed library specific aid programs already established and advised how we can donate and help. Libraries will need books, journals, access to electronic content, equipment, and staff training. Most informative was the checklist of plans we can use to learn from this incident by conducting drills, safety inspections, having emergency plans and sharing communication. While the session was not interactive and had a quite formal tone, it addressed the dire plight of these libraries and served as a cautionary example for the creation of disaster preparedness plans for all contingencies.

The New Decameron: Tales of Blackwellians and Reading and Writing Folk — Presented by **Rita Ricketts** (Blackwell's Historian, Bodleian Visiting Scholar: Centre for the Study of the Book, Oxford University)

Reported by: **Melissa Hinton** (Long Island University, C.W. Post Campus)
<Mellissa.Hinton@liu.edu>

In a lively and entertaining discussion, historian and self-described "story teller," **Ricketts**, delineated the history of **Blackwell's** from its humble beginnings to its modern role as international bookseller, publisher, and philanthropist. Using as her source the treasure trove of the **Blackwell** archives housed at the **Bodleian**, and with an obvious adoration for her topic, she acknowledged the various "players" in the **Blackwell** history, including some not-so-obvious people such as wives, mothers, and girlfriends. This approach brings these people to life in the new century. She noted that the archives are filled with rich nuggets of material and cited as an example an early letter from **J.R.R. Tolkien** that demonstrates the extent of the **Blackwell** involvement with its writers. Another item in the archives pinpoints the American connection to 1846 when a catalog that was sent to an American dealer resulted in an

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order as evidenced by an invoice dated 1853. Plans to digitize the **Blackwell** archives, an obviously rich scholarly resource, are underway.

ONIX-PL: Linking Electronic Resources and their Licensing Terms — Presented by **Friedemann Weigel**, Moderator (Managing Partner, Director IT, Harrassowitz); **Bob Boissy** (Manager, Agent Relations, Springer); **Rick Burke** (Executive Director of SCEL, the Statewide Californian Electronic Library Consortium); **Brian Green** (Executive Director, EDItEUR)

Reported by: **Patrick Carr** (East Carolina University, Joyner Library) <carrp@ecu.edu>

ONIX for Publications Licenses (ONIX-PL) is an XML format enabling a library's users and personnel to view listings of the licensing terms of accessible e-journals and databases. **Green** began the session's discussion by providing background information on the standard. He explained that the **EDItEUR** group is developing **ONIX-PL** along with **OPL**, an open source editing tool, to assist libraries in carrying out the increasingly difficult task of tracking and communicating e-resource licensing terms. He stated that the standard should be ready for general use by the end of 2008. **Burke** continued the discussion by describing the use of the **Serials Solutions** electronic resource management system of the **Statewide California Electronic Library Consortium (SCEL)** in order to test **ONIX-PL**. Next, **Boissy** offered a publisher's perspective on the standard. He highlighted the factors that should motivate publishers to participate in the standard and described **Springer's** experience using its license agreements to test the standard. Each presenter in the session agreed that **ONIX-PL** has the potential to enable librarians, publishers, subscription agents, and other stakeholders to more effectively address the complexities of e-resource management.

The Impact of BioOne Journal Packages — Presented by **Lutishoor Salisbury** (Librarian/University Professor, University of Arkansas) — (Note: Co-presenter **Carolyn Mills** (Biology Librarian, University of Connecticut) was not present.)

Reported by: **Brett Barrie** (SLIS Student, University of South Carolina) <BARRIE@mailbox.sc.edu>

Mills, who conducted the study alongside **Salisbury**, was unable to give her half of the presentation. Both halves of the presentation were covered by **Salisbury** and analyzed the various statistics of **BioOne** articles.

BioOne was launched in 2001 and developed by the **American Institute of Biological Sciences**, **SPARC**, and the **Big 12 Libraries**. It offers full text online access and offers navigation between journals from different societies. **BioOne** is offered in three different packages, **BioOne1**, **BioOne2**, and open access. It covers the life sciences, including agriculture, biology, zoology and botany. The packages are developed by aggregating content with regards to whether they were refereed, reviewed or indexed. More than half of **BioOne's** articles are indexed in more than seven databases. It was developed with cost effectiveness in mind and offers a pay per view option. The H index of **BioOne** is comparable to both **SCOPUS** and **Web of Science**.

Video – The Final Frontier? — Presented by **Stephen Rhind-Tutt** (President, Alexander Street Press); **Deg Farrelly** (Associate Librarian, Arizona State University).

Reported by: **Jack Montgomery** (Western Kentucky University) <jack.montgomery@wku.edu>

Rhind-Tutt began this presentation by stating that video in the digital format has been developing for 40 years and is the final frontier of media development.

It is a physically dense, yet engaging medium that presents a radical new way to study, teach and learn. We must begin to understand that the video clip is now the standard way to view a digital work and indexing, once unavailable, is now becoming integrated into the presentations.

Farrelly then discussed the historical, legal and license issues surrounding the digital video presentation. He sees digital video as a key element in the asynchronous evolution of the general educational experience. Even as different forms of purchasing and licensing have evolved from we are still far removed from the simplicity of consistent pricing and delivery models, standardized licensing as well as one-stop shopping. In addition we have a major task in converting conventional video media into a digital format.

Librarians have a unique opportunity to be involved in the development of a new media-paradigm.

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Literary Research Guide

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Previously available only in print, the *Literary Research Guide* will be available in September 2009 in a searchable online format for libraries. A comprehensive, annotated listing of reference sources in English literary studies, the fifth edition includes new entries describing resources published since May 2001, revisions of nearly half the entries from the fourth edition, and many more entries on electronic resources. The online format of the *Literary Research Guide* will be an especially helpful tool for librarians assisting users in evaluating reference sources in the humanities.

The online format features automatic linking to reference sources in your library's catalog, as well as a personalization tool that allows users to save searches and citations for later use. The electronic *Literary Research Guide* will be updated regularly. Libraries pay an initial fee to establish access to the electronic format of the fifth edition and an annual update fee to maintain access.

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A Tale of Three Surveys: How Librarians, Faculty and Students Perceive and Use Electronic Resources — Presented by

Allan McKeil (Dean of Libraries, Western Oregon University)

(Changed from original title: *Student's Perception of E-books – Survey Results and Discussion*; Original Speaker: **Kevin Sayer**, President, ebrary)

Reported by: **Ruth Connell** (Grasselli Library, John Carroll University)
<connell@jcu.edu>

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ebrary technology advisory board member **McKeil** provided an overview of three surveys on eBooks conducted by ebrary: one of librarians in the spring of 2007, one of faculty in fall of 2007, and one of students in the spring of 2008. The results of all are worth a look. ebrary has used them to determine what each group considers to be the most important elements of a successful eBook. Librarians look at price, the subject areas covered, the access model and the currency of the material. Faculty see the primary advantages of eBooks to be greater accessibility, greater usability, and less expense while students who use eBooks see their strengths as environmental friendliness, anytime-anywhere access, and ease of use. 82% of faculty and 83% of students who use eBooks find them as useful as or prefer them to print. Both groups admitted to preferring print for reading cover-to-cover. Students see a wider selection of titles in print and faculty members believe print is easier to access.

Concurrent Sessions 2 — Friday, November 7, 2008

Research Evaluation: Beyond Metrics to Understand — Presented by
Patricia Brennan (Product Manager, Thomson Reuters)

Reported by: **Cheryl S. McCoy** (University of South Florida)
<cmccoy@lib.usf.edu>

The scholarship process is changing and the role of journals in the scholarly communication process is also changing. Researchers are becoming increasingly engaged in collaborative projects and the dispersion of authors is more widespread. Scholars and their institutions are using citation analysis and citation mapping to track the interaction between scholars and between institutions. It has become necessary for researchers/administrators, publishers, and libraries to make use of metrics to understand what these interactions mean.

Factors driving this change include: increased emphasis on evaluation and assessment; funding pressures (budgetary and research pressure); the efforts for promotion and tenure are moving to a more quantitative measure; cross collaboration within medical research publications is tied back to funds; the global competition in the sciences; the changing nature of scholarly journal publishing; and the open access mandates.

Ten rules in using publications and citation analysis:

1. Consider whether available data can address the questions
2. Choose publication type field definitions and years of data
3. Decide on whole or fractional counting
4. Judge whether data requires editing
5. Compare like with like
6. Use relative measures, not just the absolute counts
7. Obtain multiple measures
8. Recognize the skewed nature of citation data
9. Confirm that the data collected are relevant to the question
10. Ask whether the results are reasonable

We want more eBooks! Lessons Learned from Seven Years of Embedding Electronic Books into a UK University Library Collection — Presented by
Kate Price (E-Strategy & Resources Manager, University of Surrey)

Reported by: **Ruth Connell** (Grasselli Library, John Carroll University)
<connell@jcu.edu>

From their first purchase of an eBook collection (**EngNet Base**) in 2001 through the 2007 additions of **JISC**, **Blackwell**, **Gale**, **Oxford**, and **Knovel** titles, electronic books have grown exponentially for this research library outside of London. In this case study, **Price** detailed the processes of planning and implementing their eBook collection. They dealt with selection of the titles, finding cataloging records and the impact of the electronic items on the cataloging workflow, and coping with package updates. They managed the influx of electronic titles without expanding their 1.5

professional cataloging staff. Usage statistics present their own problems; she downloads each package separately. The **University of Surrey** took part in a UK higher education survey on libraries. Their responses showed greater awareness of library materials and a high rate of continued use of the physical library.

If you want it, here it is come and get it ... Printing & Shipping Journal Issues On-Demand — Presented by **Suzanne Wilson-Higgins**

(Commercial Director EMEA, Lightning Source UK); **Beth Bernhardt**
(Electronic Resources Librarian, UNC Greensboro)

Reported by: **Kate Latal** (University at Albany)
<KLatal@uamail.albany.edu>

As **Wilson-Higgins** described, using a virtual inventory **Lightning Source (LS)** creates a print on demand (pod) copy in two days that is sent directly to the customer and is indistinguishable from the original print copy. Digital printing and electronic retailers made this viable. To adapt this process for journals, **LS** worked with three focus groups over 18 months to gather the needs and opinions of journal publishers. Pod provides advantages: no need to warehouse volumes, ability to print new copies of past volumes for new subscribers, and subscribers may opt for a print copy of an e-journal. Product aspects that differ from a traditional print journal, blank page inside covers and publishers' advertising needs, are being examined.

Bernhardt detailed additional pod applications: self-publishing, substitute for ILL, produce print copy for one customer, and reprinting o.p. titles. The digital content serves as a form of preservation too. For print runs over a certain number, traditional printing is still cost effective. One attendee suggested reordering missing journal issues instead of claiming them. Future plans include listing their titles in an eBook catalog, printing eBooks, creating course material packets, if permission is granted by all parties, and on demand film and audio.

Data Mining, Advanced Collection Analysis, and Publisher Profiles: An Update on the OCLC Publisher Name Authority File — Presented by
Timothy J. Dickey (Post-Doctoral Researcher, OCLC); **Lynn Silipigni Connaway** (Senior Research Scientist, OCLC Research)

Reported by: **J. Michael Lindsay** (Preston Library, University of Tennessee)
<jmlindsay@mc.utmck.edu>

Connaway was unable to attend the conference, so **Dickey** was the sole presenter. The **OCLC** database, containing over 125 million records, contains a vast amount of information on books, including data on publishers, subjects, and non-English materials, but effective analysis of this data has proved elusive. This presentation reported on a data mining project undertaken by **OCLC** to profile publishers in their name authority database. The goals of the project were to arrive at authoritative publisher names, understand the common variants in publisher and place names, and draw out definitions for publishing entities. In addition, the researchers wanted to understand the hierarchical relationships between publishers; that is, to understand which imprints were parts of which publishers. The researchers faced challenges with these records due to varying cataloging practices, differing abbreviations, and due to errors and misspellings in the records. These challenges were overcome by pulling records based on ISBN prefixes, clustering the data, classifying similar objects into groups, and partitioning that data. A relational database was created, preserving the hierarchical relationships. The project resulted in a variety of reports including: lists of top university presses, publisher mergers and acquisitions, top US publishing entities by ISBN, and profiled the languages published materials are in. These results demonstrated a successful methodology, and pointed the way to continuing research.

Collection Analysis and Assessment: Finding the Best and Worst in the Library Collection — Presented by **Jennifer Arnold** (Director of Library Services, Central Piedmont Community College, Charlotte, NC)

Reported by: **Linda Rousseau** (Charleston Southern University)
<lrousseau@csuniv.edu>

Ms. Arnold accomplished a yeoman's task in trying to present in one short session the process **CPCC** experienced to upgrade their library collection. Fortunately, she provided an extensive slide presentation that could serve as an excellent guidebook to others contemplating weeding. **Ms. Arnold** explained that the evaluation of the collection resulted from a recommendation by the regional accreditation agency to update and upgrade the collection by weeding the older materials. As is usually the case, the libraries' mission is to support the curricular and program needs of **CPCC**. According to **Ms. Arnold**, serious assessment of the collection had not occurred in years.

The highlights of the presentation were several: planning for weeding is absolutely essential to attain quality results; the process should also include the careful analysis of the sufficiency of the collection to support the curricular and programs needs of the institution; establish a reasonable timeframe and focus on weakest area(s) and communicate the rationale, intentions and results to an inclusive community of administrators, faculty, staff and students "...upfront and consistent[ly]..."

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Microfilm as a Primary and Secondary Source — Presented by **Tinker Massey** (Serials Librarian, Embry-Riddle Aeronautical University).

Reported by: **Kristine E. Mudrick** (Francis A. Drexel Library, Saint Joseph's University) <kmudrick@sju.edu>

As **Massey** reminded the audience, the shelf-life of properly stored microfilm is 300 years. Microfilm is used as a backup for print journals, newspapers and documents, to free up shelf space, and to replace missing materials. Sometimes the cost of subscribing to the online version of a journal may be more costly than a library can afford for archival material. In special libraries, primary source materials are often microfilmed as a means of preservation. This microfilm provides a true photographic copy and also allows researchers to use materials without damaging the original paper documents. Lending or selling these microfilm copies extends access to off-site researchers. **Massey** also provided many practical tips, such as replacing rubber bands with acid-free wrappers and placing desiccation packets in storage drawers to absorb moisture, and she drew attention to the fact that a vinegar-like smell is a sign that microfilm is deteriorating. It was also noted that commercial vendors' reproduction and sales of a library's special collections materials may serve as a source of revenue for a library. Many libraries are investing in equipment so that the materials do not have to be removed from the premises during the reproduction process.

The Costs of Electronic Publishing — Presented by **Chris Beckett** (VP Sales and Marketing, Atypon Systems)

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

Beckett gave a "tour" of the processes that take place behind the scenes. At one point he indicated that publishers sometimes "have eyes bigger than their stomachs," but it might be argued that librarians and users too often have "pie in the sky" wish lists of features that may not be economically feasible, or, in the case of publishers, more than they can afford. There are capabilities and there is scalability. Using

Atypon as an example, he shared insights and experience about issues: production, discoverability, marketing, and "business intelligence" (reports). His comment, that inventive promoting (by publishers) becomes complicated for libraries, probably resonated with librarians in the audience. New features that are coming soon (or already here): sharing, analysis of information, new forms of communication, international distribution (**DataVerse Project**), data analysis (**SETHI Project**). What is it the "version of record" or, as **Sally Morris** calls it, the "evolving agglomeration." In the question session, costs were mentioned outright — costs do not really drop in electronic publishing, because there are staff costs involved in building increasingly complex systems. We figured journals out some time ago, but "it all hasn't shaken out in the book space yet"...A colorful wheel graphic, depicting electronic production proved to be popular enough to receive requests on its availability.

Closing the Loop: Making Collections Relevant through Assessment — Presented by **Teri Koch** (Head, Collection Development, Drake University); **M. Sara Lowe** (Electronic Resources Specialist, Drake University)

Reported by: **Rita M. Cauce** (Florida International University, Green Library) <caucer@fiu.edu>

This presentation provided a case study of **Drake University's Cowles Library** assessment program. Academic libraries must demonstrate the value of their collections in order to maintain funding, and this is done by purchasing high-quality materials patrons will use, and so proving their value. The speakers showed how closing this loop with ongoing assessment can greatly benefit the library by providing a higher level of accountability and relevance. Through assessment, this library was successful in securing a portion of the IT fee charged to students, which is used to purchase new resources.

As part of their assessment, the Collection Development Committee carried out a monograph and a serials analysis. The serials analysis concentrated on a print to online migration, where the first stage involved removing print serials for which they had perpetual access. The committee gathered information from **WorldCat Analysis** and **Ulrich's** and the library liaisons worked with department liaisons in reviewing the information, such as title lists, online availability, perpetual access, etc. They kept a blog where faculty could comment on cancellation decisions. The serials analysis resulted in \$20,000 savings in their print to online migration, and an additional \$28,000 savings by canceling microform subscriptions (when duplicated in other formats) and newspaper cancellations. The monograph analysis consisted in using **WorldCat Collection Analysis** and running brief tests of the collection against other libraries. The resulting collection levels were compared against the library's conspectus level

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and resulted in evidence as to where they could cut back in acquisitions and where they needed to be more active.

As part of their ongoing analysis, **Scholarly Stats** is used for usage statistics and cost-per-use analyses are done monthly. This information is fed back into the loop: assessment tools, library repositories, acquisitions budget (includes IT fee), purchase, assessment tools, etc.

Currently the IT fee is 20% of their acquisitions budget, up from 5% when this process started in 2002. The IT fee is used mainly for electronic databases, simplifying the Library Dean's reporting of how these funds are used.

Developing a Unified Metadata Retrieval Standard for Library Systems

— Presented by **Corrie Marsh**, Moderator (Associate University Librarian, Hong Kong University of Science and Technology); **Andreas Biedenbach** (eProduct Manager Data Systems & Quality, Springer Science + Business Media); **Maria Keller** (Director of Editorial Control, Serials Solutions)

Reported by: **Miranda Schenkel** (SLIS Student, University of South Carolina) <schenkem@mailbox.sc.edu>

Biedenbach and **Keller** offered the perspectives of a publisher and an access provider on metadata and it was very insightful to think about metadata from a non-librarian viewpoint. It opened my eyes to how many different standards are currently being used in the fields of digital preservation, document delivery, cataloguing records, agencies and booksellers, search engines, and local loading. Besides the different fields of use for metadata, not everyone wants the same set of metadata, delivery method, or range of data, nor does everyone receive metadata based on the same data architecture. However, there are a few initiatives, like **KBART**, that are attempting to make unified data flows a possibility. No conclusions were posited, but it was a call of awareness: although one standard doesn't allow for individual preferences, it would allow information to flow much more fluidly. 🐾

That's all the reports we have room for in this issue, but we do have more reports from the 2008 Charleston Conference. Watch for the remaining reports in our Dec.09-Jan.2010 issue. You may also view a PDF file with the remaining reports which have not yet been published in print at www.katina.info/conference. Again we want to thank all of the conference attendees who volunteered to become reporters, providing highlights of so many conference sessions. For information about the 2009 Charleston Conference visit the Charleston Conference Website at www.katina.info/conference. — KS

IMHBCO (In My Humble But Correct Opinion)

The Journal Issue and the Record Album: Two Fundamentally Irrational Information Products

by **Rick Anderson** (Associate Director for Scholarly Resources & Collections, Marriott Library, University of Utah; Phone: 801-721-1687) <rick.anderson@utah.edu>

Over the past few years I've become more and more convinced that the scholarly information world has a lot to learn from the music industry. Not so much from what the latter is doing either right or wrong, but from what has happened to it over the past 100 years, how it has happened, and why.

From the early decades of the 20th century until the 1950s, "buying a record" generally meant buying a shellac disc that contained only a bite-sized portion of music: a popular song, a single performance of a jazz composition, a brief piece of light classical music. Each disc could hold about three minutes of recorded sound. If you wanted to listen to something longer (an entire symphony, for example), you had to buy an "album" — a package of multiple records that you played in sequence.

In the 1950s, technological advances made possible the advent of the vinyl "long-playing record," or LP. LPs were two-sided, and could hold twenty or twenty-five minutes of music on each side. They quickly changed the way musicians made music and the way record labels marketed it: having two chunks of twenty or more uninterrupted minutes to work with opened up all kinds of new expressive possibilities, and also made it possible to put together programs of ten or twelve songs and sell them as a one-disc package. "Singles" (smaller records containing one song on each side) declined sharply in popularity over the next couple of decades, and increasingly, when people talked about "buying a record," they came to mean buying an album — which was no longer a physical "album" of separate discs,

but rather an album of songs on two sides of a single disc.

The significance of this development to the future trajectory of the music business can hardly be overstated. For the first time, the way most people gained access to a song that they had heard and enjoyed on the radio was not to pay \$1 for a recording of the song itself, but to pay \$7 for a collection of ten or twelve songs that included the one they wanted. Record labels were thrilled; selling music quickly became far more profitable than it had ever been. Record buyers realized benefits as well, since a twelve-song album cost considerably less than twelve singles would have cost. But record buyers also assumed more risk than they had before: the likelihood that they would like all twelve of an album's songs as much as the one heard on the radio was low. Every music lover has had the experience of being deeply disappointed by an album that was purchased on the strength of a great single. When compact discs took over from vinyl LPs in the late 1980s, the possible length of an album had increased (from about 45 minutes to 80), but the fundamental, album-based marketing model remained virtually unchanged.

Now let's consider the scholarly journal. For centuries, journals were printed publications and were therefore subject to all the physical limitations of print. Since paper is expensive and heavy and hard to distribute, journal articles had to be gathered into batches before they could be printed and sent out to subscribers — selling articles individually wasn't feasible. This meant that the only way for researchers to get access to the articles they wanted was to buy articles they didn't want.

It was kind of like buying albums — only the journal was even more of a gamble. Subscribing to a physics journal because you had a research interest in physics wasn't like buying a country album because you liked a particular song on it; rather, it was like asking a country music label to send you every album it released because you liked country music in general. The problem with such an arrangement would be obvious: while every album would probably have one or more songs you did like, each would also have songs you didn't like and wouldn't have paid for if you could have picked them out one by one. The same was, and remains, true for journals: very few people read every article in every issue of the journals they subscribe to. Instead, their subscriptions act as a kind of security blanket — a guarantee of access to some of what you want, secured by the simultaneous purchase of what you don't.

Obviously, the physical culture surrounding the acquisition of both music and journal content has changed radically in recent years, and for a single reason: the Internet, which has liberated both kinds of information from the constrictions of physical format, thus making it possible for both songs and articles to be sold in the way that makes the most sense: by the piece. What's interesting, though, is how completely the music marketplace has changed in response to this development, and how little the fundamental structure of the scholarly information marketplace has changed. In the music realm, we have moved very quickly back to the model that prevailed between the 1920s and the 1950s, when the basic sales unit was the song. Yet even though scholarly journals have moved aggressively out of the print environ-

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