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I Hear the Train A Comin' -- The Charleston Conference at 27

Greg Tananbaum
gtananbaum@gmail.com

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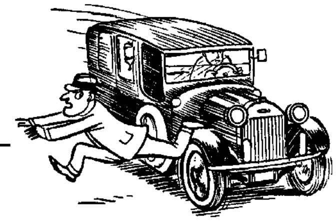

Column Editor: **Greg Tananbaum** (Consulting Services at the Intersection of Technology, Content, and Academia) <gtananbaum@gmail.com>

I first attended the **Charleston Conference** in 2001. As I recall, the topics of the day were the changing role of libraries in the digital world, and the uneasy relationship between libraries and vendors vis-a-vis pricing and access. Glad to see we have solved these issues as we approach the 2007 conference.

I suspect that these basic themes — the role of the library, and how vendors and libraries interact — are a constant through the 27 year history of the **Charleston Conference**, and will continue to shape the text and subtext of the meeting far into the future. But are we as an industry making progress in these areas? Or are we merely asking the same questions as we were in 2001, stuck on an endless scholarly communication carousel? Have we learned anything in the past six years, since 2001 keynote speaker **Tom Sanville** ruefully concluded that the dizzying pace of change rendered it "impossible for us to really know what we're doing"? In this month's column, I offer some observations on these two themes, contemplate what progress if any has been made, and lay out some possible benchmarks for future evaluation.

I. The Role of the Library

I would argue that the core mission of the library has remained basically constant since the **Bishop of Worchester** donated his collection to **Oxford University** in the fourteenth century. The library, today as then, serves to connect its patrons to information, ideas, and knowledge. While the core mission is fixed, the execution of that mission has grown increasingly complicated in the digital age. The **Bishop**'s collection was comprised of "chained books," materials that quite literally were tied to the shelves. Knowing one's patrons and their avidities was thus rendered straightforward. The librarian could simply follow the chain that connected reader to folio. In our era, of course, an incredible percentage of users never even set foot in the library. How, then, does the library understand its patrons' interests? How does the library even get a firm grasp on who its patrons are? And in a world in which peer-to-peer interaction and unfettered information accessibility are the norm, how does the library demonstrate the ongoing need for its brand of intermediation?

One possible benchmark for measuring the library's success in adapting to a rapidly changing world is the degree to which it proactively seeks to understand its client base. In what types of activities does the library engage with its patrons? Regularly scheduled meetings with department representatives? Monthly presentations open to anyone on campus? Recruitment of student representatives? Ask-the-Librarian blogs? **The Association of College & Research Libraries** provides an interesting blueprint for getting to know library patrons entitled "Standards for Libraries in Higher Education" — see *http://www.ala.org/ala/acrl/acrlstandards/standardslibraries.cfm*. The plan was produced in 2004, and so it may be a bit dated already. However, it offers a range of qualitative and quantitative measures that should be contemplated as libraries seek to understand their user base. For example on the qualitative side, the **ACRL** report recommends a formal evaluation process for big picture questions such as:

- What criteria are used to make decisions about the acquisition, retention, and use of print, electronic, and media resources? How does the library select resources for its users?
- What is the role of the classroom faculty in the selection of library resources and in the ongoing development and evaluation of the collection?
- Does the library have a continuing and effective program to evaluate its collections, resources and online databases, both quantitatively and qualitatively?
- Do print, media, and electronic resources reflect campus curricular and research needs?

On the quantitative side, the **ACRL** plan recommends comparing peer institutions on matters such as the following:

- Ratio of volumes added per year to combined total student and faculty FTE.
- Ratio of material/information resource expenditures to combined total student and faculty FTE.
- Percent of total library budget expended on materials/information resources, subdivided by print, microform, and electronic.

No magic formula for how to interact with faculty and students will produce an accurate and complete understanding of their research information needs. However, it is reasonable to say that routinized qualitative and quantitative interactions with a wide swath of patrons and prospective patrons will increase the library's odds of successful mission execution.

These interactions take on increasing importance when one considers the dramatic break we are witnessing away from traditional library service delivery mechanisms. The physical disconnect between the library and its patrons has increased linearly in the past six years. This same period has seen a dramatic decline in librarians' direct control of the information flow. Numerous studies (for example, the **Research Information Network**'s "Summary of Researchers and Discovery Services", the **Library of Congress**'s "The Changing Nature of the Catalog and its Integration with Other Discovery Tools") validate what many librarians have intuitively suspected for some time: researchers are using search engines like **Google** and **Google Scholar** as their primary means of literature discovery. Rather than trying to (a) ignore this trend toward disintermediation, or (b) tilt against the windmill and seek to undo its momentum, it seems to me — anecdotally, I hasten to add — that libraries are, by and large, doing a good job adjusting to this new reality. They are seeking to add value by offering smart search tips, integrating library resources with popular discovery paths, compiling validated lists of trusted **Web 2.0** content sources, and so forth. The first step toward this refined notion of service delivery is understanding those whom you seek to serve. In getting to know their users all over again, libraries are making progress in a rapidly changing environment toward their continuing goal of connecting patrons to information, ideas, and knowledge.

II. Library/Vendor Interaction

Has the relationship between libraries and vendors improved since 2001? In some ways, yes. In five years we have streamlined the print/electronic/backfile/combination pricing possibilities from comical levels to a more manageable set of generally accepted models. We have seen a general plateauing of the subscription price increases that plagued serials for the last fifteen years of the past millennium (see, for example, **Sonya White** and **Claire Creaser**'s excellent report, "Trends in Scholarly Journal Prices, 2000-2006"). Note that I am not suggesting that serials prices have stabilized, but rather their *annual rate of increase* has slowed to a level that has yielded an uneasy truce between vendors and libraries.

The past half-decade has also witnessed the exploration of a number of new scholarly communication initiatives that have given the library a bit more confidence in its dealings with vendors. Institutional repositories have had some success in serving as a university's intellectual archive. Open Access journals have introduced a new business model into the discussion. Communities such as **nanoHub** have built off of the proven success of **arXiv** to demonstrate the vitality of peer-to-peer communication. **SPARC** has established itself as a viable voice for policy advocacy. None of these levers by itself is substantial enough to reshape the nature of the library-vendor relationship. Collectively, however, this trend toward diverse and widespread exploration of scholarly communication alternatives within the academy has made an impact. All parties are aware that high-priced information sources are not the only game in town. The result has been, at least from where I sit, an encouraging detente in the library-vendor relationship.

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Meanwhile, back at the ranch, the hard-working **Pam Cenzer** <pam.cenzer@gmail.com> and the even more hard-working **Susan Campbell** <scampbel@ycp.edu>, bless their hearts, are doing a great job of being Mentors to those new to the **Charleston Conference**! They have turned Mentoring into an art form. Really! They are planning a **First Timers' Reception** (sponsored by **Coutts Library Services**) and all sorts of other activities. Gosh!

And speaking of **Susan**, can you believe that her grandson, **Gabe**, is ONE YEAR old! How the time flies! And being the adorable woman that she is, **Susan** has offered to knit a blanket and booties for my grandson! Not much time left so if you see her and she is not knitting, please remind her to get busy!

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Looking forward, I am not at all certain that one can devise comprehensive, fool-proof benchmarks to track the health of the library-vendor relationship. Perhaps one way to look at the macro-level state of affairs (as opposed to a micro-level view provided by, say, a specific customer satisfaction survey or focus group) is to consider progress in those areas in which libraries and vendors have significant scope for agreement. Examples include Open Data, third world access to content, reference linking, and metadata standards. Topics such as these present tremendous opportunities for trust-building. Their successful contemplation will yield wins for all parties.

Another significant way to qualitatively track library-vendor relations is to observe the dialog at events such as the **Charleston Conference**. Is there a spirit of collegiality, an esprit-de-corps that permeates the interaction among parties? In other words, when we scan across 2001 to 2007 to 2013, will we find **Charleston** attendees working collectively toward a common purpose of improving scholarly communication efficiencies? Or will we see vendors standing silently cross-armed as librarians throw daggers with their eyes? The general tenor of these interactions may in fact be a fairly accurate barometer of the library-vendor relationship.

And this is, as I see it, the value of the **Charleston Conference**. Among its myriad benefits, it offers an annual window into the state of the industry. How do librarians perceive their role? What technological and philosophical advances are impacting service delivery? How are the various scholarly communication actors working together or at cross purposes on important issues? The **Charleston Conference** helps provide a lay of the land — in 2001, today, and on into the future.

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Send ideas by July 31, 2008, to any of the Conference Directors listed above.

Or to: Katina Strauch, MSC 98, The Citadel, Charleston, SC 29409
843-723-3536 (voice) 843-805-7918 (fax) 843-509-2848 (cell)
<kstrauch@comcast.net> ***http://www.katina.info/conference***