June 2007

And They Were There -- Reports of Meetings -- 2007 ER&L Conference and more from the 2006 Charleston Conference

Editor

Recommended Citation

may be donated to other organizations. This preliminary screening has helped cut down on the number of donations we get that we cannot use.

Also, to help get the word out, our Library Committee created a "Top Ten" books wish list bookmark, which we distribute to all patrons and potential donors. It outlines what kinds of books we would like donated. This is very helpful and is also a great publicity tool.

RESPONSE:
Submitted by **Tracie Ballock** (Collection Management Librarian, **Duquesne University**)

Here at the **Gumberg Library** we look upon gifts as important additions to the library's collection. Over the years many significant items have been acquired through gift donations and have become valuable resources for our users. On the other hand it is still very important for us to remember that gift books do cost libraries money. Unfortunately donors do not realize that in reality gift materials are not "free" due to the cost of processing these items. Therefore we cannot afford to have large amounts of unsolicited, dated, moldy, highlighted materials left on our doorsteps. For these reasons we created our Donor Agreement Form which is summarized below.

- The library will accept gift books, journals (selectively), and non-print items if judged to be potentially significant additions to our collections. We seek gifts that can support the University's curriculum, faculty research and newly developed programs.

- Due to the library's limited resources to handle items requiring special treatment we will only accept items in good to excellent condition. Books that are brittle, written in or highlighted will not be added.

- If a list of donated material is not received from the donor, the library will not be responsible for creating a list when sending out the gift acknowledgement.

- The library will determine the classification, housing and circulation policies of all gift items. Gift collections will not be kept "intact" but will be integrated into the library's existing collections.

- The library retains the right to dispose of duplicates and unneeded materials. At the donor's request these items will be returned at the donor's expense.

- The library staff is not authorized under IRS regulations to appraise gifts or to provide a signature to any document that applies a monetary value to said gifts for income tax purposes.

We do ask all donors to read over and sign the Donor Agreement Form prior to the delivery of the donation.

RESPONSE:
Submitted by **Kristin Gerhard** (Collections Cataloger, **Iowa State University**)

I can't speak to our absolutely current policies, having left the collections program nine months ago, but I can tell you what we were doing (and might still be).

We have a bibliographer with many years of collections experience, a wide-ranging curiosity, and a broad understanding of the wide scope of our collection. (Let's call the person Ged). When we get large loads of gift books that are undifferentiated and did not come directly from a specific faculty member through the librarian for his/her department., we set Ged loose to do the preliminary screen. Because of Ged's background, s/he is a good decision-maker and works through these collections pretty fast.

We have a support staff member who will search our catalog, **WorldCat** and occasionally the Web for anything Ged thinks is borderline and more information is needed in order to make a good decision. Then we sort what remains by subject and put it out for bibliographer review.

The process saves time for the bibliographers, allows us to manage donations within limited shelf and storage space, and generally keeps materials moving through appropriate work flows. Of course, this is a very specific solution — not every library will have one person with the appropriate breadth and width of knowledge and experience to do this sorting well — but it's worked well for us. 🌳

And They Were There

Reports of Meetings — 2007 ER&L Conference and more from the 2006 Charleston Conference

2007 Electronic Resources and Libraries Conference, *"Think Digital,"*
Atlanta, Georgia, February 21 – 24, 2007.

Report by **Cris Ferguson** (Electronic Resources / Serials Librarian, James B. Duke Library, Furman University, Greenville, SC) <cris.ferguson@furman.edu>

The **Electronic Resources and Libraries Conference** is quickly becoming a must-attend conference for librarians, publishers, and vendors working with electronic resources. Held in Atlanta, February 21 - 24, 2007, the theme of this year's conference was "think digital," and, according to the conference program, presentations and events were selected "to foster a community with collaborative approaches to dealing with electronic resources and digital services."

The opening reception of the conference was held at the **Georgia Tech Library** on Wednesday evening. The remainder of the conference events were held at the **Global Learning and Conference Center** near the **Georgia Tech** campus.

The conference hosted two keynote speakers. On Thursday morning the conference was opened by keynote speaker **Rick Luce**, Vice-Provost and Director of Libraries at **Emory University**, who gave a talk comparing libraries to scientific study. **Luce** suggested that we, as librarians, investigate how technology influences user behavior and expectations, and then based upon observations subsequently re-evaluate the services we provide. **Jane Burke**, **ProQuest Information and Learning** and General Manager of **Serials Solutions**, was the keynote speaker on Saturday morning, speaking on the management of virtual libraries. **Burke** observed that libraries don't have the time or resources to focus on library management in the way they have in the past and should be offering more user-centric services.

On Friday morning, the conference opened with a plenary session, "Know Your Rights: Licensing, Copyright, Fair Use, and Technological Protection Measures in Electronic Resources," co-presented by **Nathan D.M. Robertson** from the **University of Maryland Law Library** and **Kristen Eschenfelder** from the **University of Wisconsin, Madison**. **Robertson** focused his portion of the presentation on discussing the laws governing copyright and license law and the limitations that apply to libraries. He also addressed the use of ERMs and the **ONIX Publications License** to help aid libraries in interpreting copyright law and licensing terms. For her part of the presentation, **Eschenfelder** discussed vendor and publisher use of technological protection measures (TPMs) that either disallow or discourage certain uses of electronic resources. For example, the **ARTstor** policy of encrypting content so that the only way to view it is through the **ARTstor** image viewer is an example of a TPM. **Eschenfelder** went on to define the difference between hard and soft TPMs.

The remaining conference presentations, over 40 in all, covered a broad spectrum of topics related to the acquisition, management, access, and use of electronic resources. The conference events were divided into ten programming themes, e-resource delivery & pro-

motion, open access, collaboration, managing e-resources, collection development, ERMs, standards, digital initiatives, users & usability, and library vendor relation. Presentations within each programming theme color-coded in the conference program, making it easy for conference attendees to identify programs with a common theme. The presentations were offered three at a time throughout the day on Thursday, Friday, and Saturday mornings.

One of the unique features of **ER&L** is the robust online community that has grown up around the conference. The conference Website, which can be accessed at *http://www.electroniclibrarian.org*, was built using **Moodle**, an open source online learning system (*http://moodle.org/*). Upon registering for the conference, participants are issued a username and password to access the secure portions of the conference moodle. The online membership on the moodle numbers over 500 people, and 350 people attended the conference in person. All **Powerpoint** presentations from the conference are loaded on the moodle for easy access. The system also allows registered participants to interact with each other and conference speakers through the conference wiki and blog. For users unable to attend the conference in person, several presentations were broadcast live over the Internet, which

allowed remote users to interact with presenters in real-time.

The **ER&L Conference** is quickly growing both in size and reputation, and is highly recommended for information professionals involved in all areas of the acquisition, licensing, and management electronic resources. Many thanks to **Bonnie Tijerina**, the **ER&L Conference** Coordinator, and the rest of the members of the conference planning committee for a well-planned and thought-provoking event.

26th Annual Charleston Conference — Issues in Book and Serial Acquisition, "Unintended Consequences," Francis Marion Hotel and Embassy Suites Historic District, Charleston, SC, November 8-11, 2006

Charleston Conference Reports compiled by: **Toni Nix** (Asst. to the Editor, *Against the Grain*) <justwrite@lowcountry.com>

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*From your Editor: The 2006 Charleston Conference was fabulous! Many thanks to **Ramune Kubilius** and all her **ATG** reporters who submitted reports. The entire 2006 Charleston Conference Proceedings is being published by **Libraries Unlimited/Greenwood Publishing Group**. Watch for additional details and conference reports in upcoming **ATG** issues. — KS*

Preconference — Wednesday, November 8, 2006 — *Serials Resource Management* — Presented by **Buzzy Basch** (Basch Subscriptions, Inc.)

Report by **Allyson R. Ard** (EBSCO Industries, Inc.)
<aard@ebsco.com>

Buzzy Basch's, **Basch Subscriptions, Inc.**, session offered a well-rounded group of panelists and topics. **Susan Zappen**, **Skidmore College**, discussed her fight against rising serial prices, budget cuts, and cancellations which have left her "sleepless in Saratoga." **Julia Gammon**, **University of Akron**, described the changes she made to improve serials staff performance by adding professional development activities, individual monthly assignment lists, and monthly progress meetings. **Tim Bucknall** of **UNC Greensboro** focused on the need to find and include open access titles in the library's collection. They have done so by including them in their link resolver's knowledgebase. This effort resulted in independent, free titles being the second most used source. **Rick Burke** of **SCELC** spoke on using their ERMS for consortial resource management. **Rollo Turner** covered the role of **ASA** and their efforts. One item noted was that he would like to build

one database for all publisher dispatch data. Libraries could view the dispatch dates to see if they need to claim an issue yet. Lastly, one thing noted by **Chuck Hamaker** of **UNC Charlotte** was that content providers need to brand PDFs so library users and even staff will know that it is licensed, not free, content they find on **Google**, etc.

Preconference — Wednesday, November 8, 2006 — *How Readers Navigate to Content: Lessons for Librarians and Publishers* — Presented by **Chris Beckett** (Scholarly Information Strategies, Ltd.), **Simon Inger** (Scholarly Information Strategies, Ltd.)

Report by **Julie C. Harwell, MLIS** (Training Resources Manager, EBSCO Industries, Inc.; Phone: 205-980-3788; Fax: 205-981-4087) <jharwell@ebsco.com>

In *How Readers Navigate to Content: Lessons for Librarians and Publishers*, **Chris Beckett** and **Simon Inger** with **Scholarly Information Strategies Limited**, did a sound job of providing an overview of the access points for information and the tools libraries and information industry currently have to ensure appropriate access and maximized use of resources. In this four hour, afternoon pre-conference, a crash course of information included: contrasting the various access points for information, including gateways and hosts and portals; authentication options (from proxy to Shibboleth); usage stats; ERMs; linking protocols and standards; library catalogs; link resolvers; A-to-Z lists; and federated searching. While **Beckett** and **Inger** were engaging and knowledgeable,

the content covered was not what I expected when I chose to attend this pre-conference. Based on the title and the description, I anticipated a review of current research on user behavior and their actual search strategies; in other words, an updated, focused session similar to **Inger**'s *The Landscape of Scholarly Communication* at the **2005 Charleston Conference** (see *http://sis.squarespace.com/presentations/2006/4/4/the-landscape-of-scholarly-communication.html*). The results of that research were mentioned briefly at the beginning of the pre-conference. From the description, "The recent upsurge in the deployment of library technologies has altered significantly the navigational path taken by readers to e-journals. Readers are more likely to arrive within a journal Website at the article or abstract level quicker than ever before and this has significant implications for Website design. Moreover as library Web pages grow more functionality such as federated search and the inclusion of RSS feeds, readers will be less likely to use advanced features of publisher Websites. This session reviews recent developments in library technology and data from user surveys and suggests what publishers should consider when building content Websites."

Session — Thursday, November 9, 2006 — *Massive Scale Librarianship* — Presented by **David Lankes** (Associate Professor School of Information Studies, Syracuse University)

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

The ability to store exabytes (i.e., huge quantities) of information raises many issues: privacy, ethics (e.g., unintended censorship), commercialization and scarcity (e.g., researchers not being able to access privately held weather data), security, culture and control, preservation and migration. The existence of large scale data permits activities previously unimagined. **Lankes** suggests that librarians embrace this by recognizing that we are in the "conversation" business, not the "thing" business, and develop unified, massive scale librarianship using a participatory library system that synthesizes the many sources of information. He envisions faculty uploading articles to the library systems where books and blogs about them coexist, where a variety of conversations take place in the library space. He emphasized that this is an opportunity to not only enhance the library mission, but to proactively position librarians at the forefront of the information field "where they belong."

Session — Thursday, November 9, 2006 — *After the Dinosaur Killer: Adaptation and Survival* — Presented by **Michael Pelikan** (Information Sciences & Technology Librarian, Penn State University)

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

Those who may not be familiar with dinosaur species still should have been able to follow the speaker's thought processes and analogies…Using a phrase from the **2005 Charleston Conference**, speaker **Pelikan** wondered whether the "horseless carriage" is today's "digital library." The current "moon shot" is licensing, with its standards, elements, vocabulary, authentication/authorization issues. Look to **Open Source Initiative**'s (**OSI**'s) interconnectivity model. The academic community has lost control of its output and is forced to buy back from the commercial sector, and a bypass mechanism represents a "cataclysmic battle" (King Kong vs the dinosaur). Who is the dinosaur? Commercial publishers? Libraries? Business models abound; the paradigm has not changed. Librarians and patrons each have their world view. There was a time when philosophy was a science. Students think on their feet; they can opt to sell/pay for papers through a "research services" (e.g., academon). Scholarly authors still want to

be recognized and are organizing communities with user:user interaction. Adaption and survival, the search for the "killer app," marketing and licensing directly to end-users, "little tykes" (**Cite Seer**, **Google Scholar**, "click forensics")… Experience comes from bad judgement. Have we already lost a generation of scholars? If we get locked (our views) into our self-confirming world (comfort zone), we will richly deserve our fate…

Lively Lunch – Thursday, November 9, 2006 – *Making the Commitment to Open Access: The 6th Annual Health Sciences Lively Lunch* – Presented by **Lynda Hartel** (Collection Development & Resource Management Librarian, Prior Health Sciences Library, Ohio State University), **Jan Maxwell** (Assistant Dean for Collection Development, Ohio University Libraries)

Report by **Nathan Norris** (Medical Librarian, Agoos Medical Library, Beth Israel Deaconess Medical Center)
<nnorris@bidmc.harvard.edu>

Ramune Kabilius (Galter Health Sciences Library, **Northwestern University**) provided an update on news, which affected collection development in the health sciences library community during the past year. Some of the trends discussed included library re-organization and absorption back into their affiliated academic libraries. Currently there are more questions than answers regarding the direction of Open Access (OA). There is also some uncertainty about the long-term role for health sciences libraries. Should they standardize collections ("Walmartization") or distinguish themselves through the creation of specialized "boutique" collections? **Ramune** provided a handout containing news summaries and links to pertinent resources.

Much of the remainder of the session focused on the commitment to OA by its major stakeholders — the **NIH**, publishers and librarians.

The lunch organizers were unable to locate a speaker from the **NLM** or **NIH** willing to speak with the group on OA. However, **Lynda Hartel** and **Jan Maxwell** outlined the **NIH** commitment by quoting from **Norka Ruiz Bravo**, Deputy Director for Extramural Research for **NIH**. Policies included **Enhancing Public Access to Archived Publications Resulting from NIH-Funded Research** (*http://grants.nih.gov/grants/guide/notice-files/NOT-OD-05-022.html*), **The American Center for Cures Act of 2005** (*http://thomas.loc.gov/cgi-bin/bdquery/z?d109:s.02104:*) and the **Federal Research Public Access Act of 2006** (**FRPAA** — *http://thomas.loc.gov/cgi-bin/bdquery/z?d109:s.02695:*).

Publisher commitments to this movement were also outlined; **Blackwell**, **BMJ**, **Cambridge Journals**, **Oxford** and **Springer** were mentioned as having OA programs.

Library budgets were discussed, in the context of the traditional subscription model as well as the "membership model" to support author publishing and to enable "free" access to publications in resources such as **BioMed Central** and **PLOS**. Other libraries mentioned that they were supporting grants for faculty to publish. Using consortia to pay author fees was suggested as another possible way to support OA. As of yet, none of the libraries represented had had to decide whether to cancel traditional journals in favor of alternative OA journals. New OA journals are simply being added to holdings, and library workflows now incorporate resources such as the **Directory of Open Access Journals** (**DOAJ** — *http://www.doaj.org/*). Although several librarians had made efforts to introduce faculty to the OA concept, thus far, they had received little feedback from their faculty and patrons regarding OA.

During the session, **David Goodman** (**Long Island University**) spoke in support of "hybrid OA" and stressed that we have a duty to educate our constituencies to produce alternative resources such as **PubChem** (*http://pubchem.ncbi.nlm.nih.gov/*). Others felt health sciences librarians needed to locate and foster "champions of OA" within their own institutions and play a role in assisting with the submission of articles for OA.

Many attendees felt that it was important for librarians to focus on influencing society publishers, and it was suggested that our libraries could benefit from joining societies such as the **Society for Scholarly**

Publishing (**SSP** — *http://www.sspnet.org/*) or the **Professional and Scholarly Publishing Division** (**PSP** — *http://pspcentral.org/*) of the **Association of American Publishers** (**AAP**). Attendees also suggested that it would be useful for the **Medical Library Association** (**MLA**) to provide representation to some of these organizations. The group also heard from **Meg White** (former president of the **American Medical Publishing Association** — **AMPA**) that **AMPA** had become a committee called the **American Medical Publishers Committee** (**AMPC**) folded into the **PSP** division of the **AAP**. Finally, it was suggested that a good topic for next year's lively lunch would be health sciences libraries' involvement in societies representing health sciences publishers. The lunch could include speakers from one or more of these organizations.

Lively Lunch — Thursday, November 9, 2006 — ***Ordering with eVA — How One University Library Works with the State's Electronic Procurement System in Virginia*** — Presented by **Polly Khater** (Director, Technical Services), **Stephen Brooks** (Head Acquisitions & Gifts, George Mason University)

Report by **Julie C. Harwell, MLIS** (Training Resources Manager, EBSCO Industries, Inc.; Phone: 205-980-3788; Fax: 205-981-4087) <jharwell@ebsco.com>

In ***Ordering with eVA — How One University Library Works with the State's Electronic Procurement System***, **Polly Khater**, Director, Technical Services, and **Stephen Brooks**, Head Acquisitions & Gifts with **George Mason University** shared the challenges of the mandatory implementation of eVA (*http://www.eva.state.va.us/*), Virginia's award winning e-procurement system utilizing **Ariba(r)**. The library now has three resources to manage and reconcile library acquisitions: eVA, BANNER (used by GMU for all accounting), and their ILS. There exists no transfer of data between the three systems; however, other universities within the state have been successful in programming connectors between other ILS products, eVA and other accounting systems. Each institution is responsible for forging such connectivity, and most do not have the resources to do so. One of the most challenging aspects with eVA is anticipating at the beginning of the fiscal year, the amount of money that will be spent with a vendor. A purchase order (PO) for each vendor is created at the beginning of a fiscal year, and as invoices are received, the amount is deducted from the master PO. If the library will spend less than $2,000 with a vendor, the library manages the creation of the PO via eVA and can modify the amount, if needed.

For acquisitions in excess of $2,000, the University Purchasing department must create the PO, and only the creator of a PO can edit it. While the purchasing department has allowed the increase of some POs, they have advised the library that this is done too often. The Q & A discussion included several sympathies from fellow Virginia institutions who have encountered similar frustrations. It is difficult to nail down an amount that will be spent with a vendor. Special deals and offers like one-time backfiles cannot be foreseen. Each PO has a transaction fee for both the supplier (e.g., a database provider) and the ordering agency (e.g., **George Mason**). In addition to transaction fees, there are annual registration fees for each participating vendor.

Lively Lunch — Thursday, November 9, 2006 —*Surprising Subscriptions: How Electronic Journal Publishing Has Affected the Partnership Among Subscription Agents, Publishers and Librarians* — Presented by **Heather S. Miller** (University at Albany), **Ezra Ernst** (Swets Information Services), **Dan Tonkery** (EBSCO Information Services), **Dean Schoen** (Harrassowitz), **Kimberly Steinle** (Duke University Press), **Tony McSean** (Elsevier), **Thomas Taylor** (Sage Publications), **Stephen Clark** (College of William and Mary), **Lila Ohler** (University of Oklahoma Libraries), **Susan Zappen** (Skidmore College)

Report by **Mary Hawks** (Collection Management Librarian, University of Arkansas for Medical Sciences) <hawksmarys@uams.edu>

Heather Miller as moderator asked questions of a panel of three subscription agents, three publishers and three librarians. Subscription agents all agreed that they still do much of what they have always done best: keep track of the journals each library subscribes to, cancellations, and payments. The switch to electronic journals, however, has added a new layer to the agents' job. Now they not only order the subscriptions but also help set up and maintain online access. Libraries demand immediate response to access problems. With print subscriptions claiming was a much less urgent problem. They welcomed working with consortia and see a growing role of the agent dealing with licenses and price caps. Publishers voiced similar concerns. Electronic journals have added the need for usage statistics and technical support for immediate solutions to access problems. Driven by libraries' demands they now deal more directly with customers and consortia. One publisher stated that all of these issues require a sophisticated subscription management system that does not yet exist. The librarians all have experienced increased and more sophisticated workloads with e-journals. All three of the librarians rely heavily on agents. The librarians hope for more consolidated usage statistics, more standardized, less complex licenses, and new pricing models.

Future Dates for Charleston Conferences

	Preconferences and Vendor Showcase	Main Conference
2007 Conference	7 November	8-10 November
2008 Conference	5 November	6-8 November
2009 Conference	4 November	5-7 November
2010 Conference	3 November	4-6 November

Session — Thursday, November 9, 2006 — *The University of Hong Kong's Million eBooks: An Alternative to Waiting for Google's Millions to Arrive on our Doorsteps* — Presented by **Anthony W. Ferguson** (University Librarian, University of Hong Kong, SAR, China)

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

Having a large number of eBooks rather than just a few increases the possibility that they will be used and gives a small, remote university important books it would not otherwise have. The library of the **University of Hong Kong** would rank about 40 if it were an **ARL** library. eBooks are useful due to increased online learning, the fact that students expect online content, there are increasing numbers of good eBooks and they complement problem based learning. He noted that people use eBooks and printed books differently and that the library adds about 100,000 volumes per year. The **University of Hong Kong** purchased most of the million eBooks in its collection, but some were leased and some digitized. Many are in Chinese and the library has created a business of cataloging Chinese language eBooks. Last year they cataloged 158,757 e-resource titles. All records are in **OCLC**. Managing eBooks is staff intensive; only about half are cataloged so far. **Ferguson** plans more eBook purchases, more acquisition of free eBooks, more cataloging and more integration between eBooks and other e-content.

Session — Thursday, November 9, 2006 — *Online Journal Security: A Panel Discussion on the Issues Surrounding Publisher Protection of Content and Security Breaches (Part 1)* — Presented by **John McDonald** (Acquisitions Librarian, California Institute of Technology), **Andrea Lopez** (Online Sales & Site License Manager, Annual Reviews), **Steven Hall** (Journal Sales & Marketing Director, Blackwell Publishing), **Liz Lorbeer**, (Associate Director for Content Management, University of Alabama-Birmingham)

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

Attendees who opted to attend this session should have planned to stay for Part II (this reporter did not, unfortunately and missed two listed presenters who probably spoke in Part II). During the time allotted to Part I, session moderator **McDonald** began by describing prohibited users — obvious: those who alter, recompile, resell and more fuzzy: those who systematically / programmatically copy or download. Breaches are more obvious to librarians than users. Publishers may be proactive, reactive, friendly, and incomplete in their actions as they plan to turn off access. Librarians and publishers each have different desires/needs regarding security improvements. Presenter **Lopez** indicated that the goal of **Annual Reviews** is to stop abuse, but not stop legitimate users. She went through the volume/numbers that trigger blocking, the responses, and emails to licensing subscribers as planned action is to take place. Investigation can unearth misc. reasons: foreign unauthorized administrative password users or more innocent (but high volume) authorized faculty users preparing to go on sabbatical in a foreign country where they fear not having access to computers/Internet/this suite of journals. Presenter **Hull** equated licenses to nuptial agreements. **Blackwell's** library board recommended needed new guidelines on perceived misuse. Key changes in the Nov. 30, 2006 revised guideline release: increased the length of time before action is taken, more information provided to the library account administrator, and decrease in the timing of the block. (No mention was made of the post-CC news about **Wiley** announcing its plans to purchase **Blackwell Publishing**, and how the game may change). Presenter **Lorbeer** presented ideas on how libraries have taken on online journal security issues. These often begin with user behavior.

There are innocent triggers and ambitious library users. In her opinion, publishers should: notify libraries right away, turn off access at the machine level whenever possible (not institutional IP level), explain their actions, provide contact information to remedy the problem, increase the thresholds for downloading content.

Session — Thursday, November 9, 2006 — *The Transfer Initiative: Creating Best Practice Guidelines for the Transfer of Journal Titles Between Publishers* — Presented by **Nancy Buckley** (International Journal Sales Director, Blackwell Publishing), **Jill Taylor-Roe** (Head of Liaison and Academic Services, Newcastle University Library)

Report by **Nancy Beals** (Electronic Resources Librarian, Wayne State University, Detroit, MI) <am4886@wayne.edu>

TRANSFER (*http://www.projecttransfer.org*) is a project that is creating standards to address the challenges of the movement of journals between publishers. **Nancy Buckley** <nancy.buckley@oxon.blackwell-publishing.com> is the chair and although **Transfer** is still in the early part of the project, which began earlier this year, there is a great deal of work to still be done. The aims, scopes and guidelines for transferring and receiving between publishers are available at the URL. They have created a working group and an advisory board which includes many people from the industry such as librarians, publishers and agents.

The movement of titles between publishers has created a lack of clarity mainly in the area of print to electronic. Currently, it is not clear who is responsible for customer satisfaction. Transfer is creating a code of conduct or good practice guidelines so that the annual movement causes minimal disruption. The communication issue, which is the largest issue, needs to be addressed so that this process can be easier. There are also legacy and archive, licensing and pricing issues.

It is most often when societies move publisher arrangements, not necessarily journals, where many of the problems and frustrations lie. The societies move to commercial publishers generally because of revenues, editorial policy and pricing, economies of scale, usage data, and Web presence and for other reasons. They want to build up their society, include more content and use PR and innovation.

This creates implications for the:

Publishers — who have to merge their data with existing systems and interpret it, platform format/content changes, links and back file ownership.

Intermediaries — Every title that moves can create 10-15 subscription transactions made in their systems, so far there have been over 5000 title changes this year, you can see how this can become a difficult situation.

Librarians — Timing, the librarians need to know well in advance for their budgeting purposes, they need to retain appropriate access, be able to collect usage data (preferably **COUNTER** compliant), and experience no negative access. All in all, it needs to be timely and an easily accessible source of data on transfers!

Transfer is looking into the idea of a central repository that will hold all of these details that are included in a move. This would be a large database with all of the transfer aspects housed in it for reference. **Transfer** is currently in collaboration with the **STM Association** and **ALPSP** and is housed under the **UKSG**.

Session — Thursday, November 9, 2006 — *What Consultants Tell Publishers That Libraries Might Be Interested To Learn* — Presented by **Greg Tananbaum, Moderator** (Consultant & Entrepreneur), **Peter Banks** (Founder, Banks Publishing), **John Cox** (Managing Director, John Cox Associates Ltd.), **Chris Beckett** (Director, Scholarly Information Strategies Limited)

Report by **Katherine L. Latal** (Head, Acquisitions Services Department, University at Albany, University Libraries) <KLatal@uamail.albany.edu>

Greg Tananbaum set the stage for a peek behind the curtain into the consultants' world. **Peter Banks** advised that with the move to open access and electronic publishing we are in a new environment with new expectations, but this transition is not the end of paper. Consultants help clients manage transitions. **Banks** cautioned that although there are new roles for scholarly publishers to play in actively creating and distributing content both in print and electronically, everything does not need to change at once. As publishers move into open access models they should test and evaluate changes and that an increase in interaction between publishers and librarians is needed. **John Cox** organizations use the information provided by a consultant for reassurance when making decisions and to avoid risk. Customers ask for distribution analysis data, marketing strategies and evaluation of suite of standard licenses. He explained how a consultant identifies potential customers through networking and how a consultant determines their daily rate for a project. **Chris Beckett** discussed how publishers use information from consultants to learn about their customers' information needs, review their use of technology, and assess their Internet "silos" of information in order to inform their decisions when planning for change.

Session — Thursday, November 9, 2006 — *Are You Taking Baby Steps Towards Your New ERMS?* — Presented by **Anjana Bhatt** (E-resources Librarian, Florida Gulf Coast University)

Report by **Tim Hagan** (Serials Electronic Resources Librarian, Northwestern University Library) <t-hagan@ northwestern.edu>

Anjana Bhatt enthusiastically spoke to a full room on the practical side of implementing and using an electronic resource management system. After discussing background information on ERMS and the DLF ERMI principles, as well as listing currently available systems, **Anjana** discussed preparation issues for ERMS implementation. These included strong emphasis on the need for the system to be integrated to existing systems, proper training, and conducting a thorough review of all current information one has for e-resources. The unpleasant, yet necessary step of manually inputting data into an ERMS was discussed.

Anjana then gave a live demonstration of her institution's ERMS, **SerialsSolutions**. Seeing an ERMS in use, by a user, was appreciated by the audience, most of whom had seen only vendor demonstrations. **Anjana** demonstrated most aspects of her ERMS implementation, commenting on her favorite parts — such as license management — and least favorites — such as lack of a financial interface. The session finished with an overview of the alerts feature of the **SerialsSolutions ERMS**. 🐾

The conclusion of our reports from the 2006 Charleston Conference will appear in the September issue of Against the Grain. So … don't miss it! Make sure you have renewed you ATG subscription. And, for information on the 2007 Charleston Conference or to register online visit the Charleston Conference Website at www.katina.info/conference. — KS

Wiley & Sons Inc has been selected by the **Financial Management Association International (FMA)** to publish *Financial Management,* their flagship journal**.** Wiley-Blackwell will publish the quarterly journal in print and online via **Blackwell Synergy** *(www.blackwell-synergy.com)* effective February 2008. Now in its 35th year of publication**,** *Financial Management* publishes primary research in finance addressing key issues in business, finance, economics, and organizational decision-making. **Dr. William Christie**, **Frances Hampton** Current Professor of Finance and Professor of Law at **Vanderbilt University**, will continue to serve as the editor of the journal. *www.fma.org www.wiley.com. www.blackwellpublishing.com interscience.wiley.com.*

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And with this issue we have our THIRD part of **Ricbard Abel**'s story of the **Richard Abel Company and the creation of the Approval Plan**, p.77. It's fascinating to read how the industry has changed in just 40 short years! Anyway, I was talking to the awesomely entrepreneurial **Gail Schlachter** <findaid@aol.com> about the **IRPG (Independent Reference**

Publishers Group) meeting in Washington and I asked **Gail** if she had any communication with **Dora Biblarz** <biblarzd@yahoo.com> as **Richard Abel** and I had been trying to get hold of **Dora** since she has some great **Richard Abel files**! Voila! I got an email from the wonderful **Dora**. As we all know, **Dora** is retired and she says she is not getting to her email that much. She says the files are in storage. **Dora** and husband **Mike** have been traveling around in their RV for the past three years, and just prior to that they sold their home in Tempe (that's why everything is in storage including the **Abel** files). Unfortunately **Mike** has cancer and they are moving to LA for two months so **Mike** can get treatment. When the treatment is under control, they hope to begin building their new home in Payson, Arizona. **Dora** says to write when we can, although she doesn't

know when she will get a chance to read her email. **Dora** says she reads *ATG* and keeps up with us! Here's hoping that **Mike**'s treatment is successful. Our prayers are with you both, **Dora** and **Mike**.

Was also talking to **Miriam Gilbert** <mxgilbert2@aol.com> <miriamg@rosenpub.com> who tells me that she and son **Ben** are doing okay. **Ben** has formed a fantastic rock/jazz band — **The Citizenz**. They are playing their own songs and sounding good. **Ben** will spend six weeks this summer in Poland and Israel. He's going with 100 teens (all rising seniors) from Colorado many of whom he knows for youth group activities. Plus, in her spare time (ha), **Miriam** is Director of Electronic Sales