September 2010

And They Were There-Reports of Meetings

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Recommended Citation

Kubilius, Ramune K. (2010) "And They Were There-Reports of Meetings," *Against the Grain*: Vol. 22: Iss. 4, Article 28.

DOI: <https://doi.org/10.7771/2380-176X.5616>

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And They Were There

Reports of Meetings — 29th Annual Charleston Conference

Issues in Book and Serial Acquisition, “Necessity is the Mother of Invention,” Francis Marion Hotel, and Embassy Suites Historic District, Charleston, SC, November 4-7, 2009

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 **Charleston Conference** attendees who agreed to write short reports that highlight sessions they attended at the 2009 conference. All attempts were made to provide a broad coverage of sessions, and notes are included in the reports to reflect known changes in the session titles or presenters that were not printed in the conference’s final program. Please visit the **Conference Website** for presentation material (PowerPoint slides, handouts) and taped session links. The **2009 Charleston Conference Proceedings** will be published sometime in Fall 2010.

In this issue of **Against the Grain** you will find the third installment of 2009 conference reports. The first installment can be found in **ATG** v.22#1, February 2010 and the second installment appears in **ATG** v.22#3, June 2010. We will continue to publish all the reports received in upcoming **ATG** print issues, however in the meantime, all the reports that have not been published yet can be found on the **ATG Website** by visiting <http://www.against-the-grain.com>. — **RKK**

Lively Lunches — Friday, November 6, 2009

Law Libraries: Our Perceptive on “Necessity is the Mother of Invention” — Presented by **Edward Hart** (Head of Technical Services, University of Florida, Lawton Chiles Legal Information Center); **Paula Tejada** (Associate Law Librarian/Head Technical Services, Charleston School of Law); **Michelle Pearse** (Librarian for Open Access Initiatives and Scholarly Communication, Harvard Law School Library)

Reported by: **Tracy L. Thompson-Przulucki** (New England Law Library Consortium (NELCO)) <tracy.thompson@yale.edu>

This session was the brainchild of **Hart**, who hopes to follow on the success of the medical librarians and make this a regularly featured lively lunch, bringing together the law librarians who make the trek to Charleston (or those like session co-organizer **Tejada** who call Charleston home!). He invited **Pearse** to discuss **Harvard Law Library’s** efforts to help implement the university’s groundbreaking open access policy for scholarly journal articles and other open access initiatives. **Pearse** explained that the mandate, requiring faculty to submit their scholarship for inclusion in **Harvard’s** OA repository, **DASH (Digital Access to Scholarship at Harvard)**, built on the **DSpace** platform, also includes provisions for faculty to opt out. **Pearse’s** presentation was followed by a discussion of the increasing importance of discovery to open access. Calling all law librarians! Plan to make this one next year.

The Changing Roles of Acquisitions Librarians and the eBook Acquisitions Landscape for Academic Libraries — Presented by **Dung-Lan Chen** (Bibliographic Services/Acquisitions Librarian, Skidmore College); **Lorie Wies** (Acquisitions/Periodicals Librarian, Union College)

Reported by: **Christina Bellinger** (University of New Hampshire Library) <Christina.Bellinger@unh.edu>

Wies began the session with an amusing history of library acquisitions beginning with the collections of tablets at the palace of Ashurbanipal through the current state of online publishing, which has caused the blurring

of the lines among collection development, acquisitions, and cataloging by introducing electronic resources in collections with vendor supplied cataloging and virtual approval plans. **Chen** picked up the story with the growth of electronic materials and the steady decline of print circulation. eBook publishing is expanding with many vendors offering their own multi-publisher platforms. She discussed the “big deals” in monograph acquisitions, similar serial title packages, that offer many titles, but limit control over collection development. **Chen** discussed the added value and some of the drawbacks of eBooks and gave the audience some suggestions for promoting them to library users.

Transformational Change: The 9th Annual Health Science Lively Lunch — Presented by **Pat Thibodeau** (Associate Dean for Library Services, Duke University Medical Library); **Meg White** (Director, Technology Services, Rittenhouse); **Ramune K. Kubilius** (Collection Development / Special Projects Librarian, Northwestern University, Galter Health Sciences Library)

Reported by: **Beth Ketterman** (East Carolina University, Laupus Health Sciences Library) <KETTERMAN@ecu.edu>

After an introduction from moderator **White** and an annual trends update by **Kubilius**, **Thibodeau** led this session focusing on the future of the academic health sciences library. She suggested that **Duke’s** library has aligned with institutional priorities, and suggested that this will become standard operating procedure for libraries — each one will look more and more like their respective institutions and less and less like each other. **Thibodeau** suggested that the library is moving from a product-based entity to a experiential-based entity: technical services departments will be reduced, staff will become more embedded in the community, and staff must become more digital-oriented. Administrators will not replace retiring librarians if value is not perceived. Technical and public services will merge. Streamline original cataloging (**Duke** has one original cataloger left) and make unique collections more visible. STOP adding local information to records — bring them in from OCLC and leave them alone. After a lively discussion between **Thibodeau** and session attendees on topics ranging from the elimination of **UpToDate** at **Duke**, to the state of technical services in the library, **Thibodeau** left session attendees a bit shaken, but with practical ways they can adapt current workflows to the inevitable changes for libraries in the future.

Book Dust Jackets in Academic Libraries — Presented by **Patricia Pettijohn** (Head, Collection Development & Technical Services, University of South Florida St. Petersburg)

Reported by: **Beth McDonough** (Western Carolina University, Hunter Library) <bmcldono@email.wcu.edu>

When **Pettijohn’s** library changed its dust jacket policy, she saw an opportunity to conduct much-needed research into the effect of dust jacket retention on circulation. To **Pettijohn’s** knowledge, there has been only one other such library study conducted. By happy circumstance, the author of the previous study, **Tinker Massey**, a serials librarian at **Embry Riddle University**, was in the audience for the presentation and was able to add her commentary to the session (**Massey’s** own research was presented at the **Charleston Conference** in 2005).

Pettijohn’s research found higher circulation and lower zero-usage rates for dust-jacketed books versus those without dust jackets. She

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also conducted a survey of 252 academic libraries, which found that of those with dust jacket policies, 36.7 percent discard dust jackets, while 35.9 percent retain them. Interestingly, of those libraries that discard dust jackets, the reason given was simply because academic libraries do not retain dust jackets on books. The survey also found that contrary to popular belief, eBooks were among the least preferred formats for book acquisitions, with 46 percent of libraries selecting paper formats when available. Citing both the “coffee bar” effect and the “Amazon” effect, **Pettijohn** called for a reexamination of the practice of discarding dust jackets in academic libraries. Unfortunately, the session was sparsely attended — in itself further testimony to one of the major points of the presentation: academic library decision-making about dust jackets is largely based on a tradition of indifference.

Dangerous Liaising: Moving from “Ownership” to “Access” in the Academic Library — Presented by **Ellen R. Urton** (Visual Arts Librarian, K-State Libraries); **Regina M. Beard** (Business Librarian, K-State Libraries); **Adam Wathen** (Head, Collections Services Department, K-State Libraries)

Reported by: **Miranda Bennett** (University of Houston, M. D. Anderson Library) <mhenry4@uh.edu>

In this Lively Lunch, three librarians from the same institution offered their perspectives on the direction their libraries are taking away from an “ownership” model toward a policy of “access.” **Wathen**, speaking as a department head, explained how the libraries’ 2007 strategic plan called for the libraries to shift from “collection-centered” to “patron-centered” and described some of the implications of this plan for collection development and management. Then **Beard**, a member of the newly created Collections Council, talked about how the council approach has enabled the libraries to write collection policies and implement projects around such issues as journal cancellation and eBook acquisition. The audience had several questions about the council model, especially about its role in the development and enforcement of policies. Finally, **Urton** presented the viewpoint of a subject librarian, noting that “this is where it really gets dangerous.” She recounted her experience as a brand-new librarian working with departments with unique collection needs. Her part of the presentation made clear that policies and procedures must be flexible enough to allow exceptions and exposed some of the challenges of encouraging faculty to let go of “ownership,” which is, after all, the model “we taught them.”

Champagne Tastes on a Pepsi Budget: Working with Difficult Economic Times — Presented by **Glenda Alvin** (Assistant Director, Tennessee State University); **Jack Montgomery** (Collection Services Coordinator, Western Kentucky University); **Lisa Barricella** (Head, Monographic Acquisitions & Preservation/Conservation, East Carolina University); **Connie Foster** (Professor and Head, Department of Library Technical Services, Western Kentucky University)

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

Barricella described the budget crisis she and her staff faced when the state froze all spending and forced the library to cancel planned purchases. She offered practical advice on how to handle a sudden halt in revenue. **Foster** shared insights on effective approaches that can be used to handle reductions to the serials and electronic resources budget. Moderators **Montgomery** and **Alvin** opened the discussion up to the Technical Services managers who attended the Lively Lunch.

Participants were encouraged to share their experiences and exchanged ideas about managing personnel changes and re-organizing workflows to accommodate budget reductions.

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Twittering in the Library World — Presented by **Cris Ferguson** (Electronic Resources / Serials Librarian, Furman University); **Xan Arch** (Electronic Resources and Technology Librarian, Stanford University)

Reported by: **Kyle McCarrell** (SLIS Student, University of South Carolina) <kylemccarrell@gmail.com>

“What’s happening?” That was the question posed by **Ferguson** and **Arch** as they discussed the impact of the social network site **Twitter** on society, and specifically, libraries, at a Friday Lively Lunch session. Designed for both the novice and experienced user, the wide-ranging session began with a brief description of **Twitter** and continued with specifics of how the service works. Some of the topics discussed included privacy issues, **Twitter** etiquette, URL shorteners, and ReTweeting. Special mention was also made of **Twitter**’s search capabilities, particularly for localized information. After breaking down the basics of **Twitter**, **Ferguson** and **Arch** focused on the ways **Twitter** can be used in professional communication, specifically as a marketing tool. While some use **Twitter** as a means to post useful information on special events and jobs, others work to build a sense of community within their library. Finally, the presenters gave the attendees some questions to consider before launching their own **Twitter** accounts. These included deciding on one’s purpose, how often to post, and how to publicize/market one’s account. The session ended with a diverse question-and-answer session about setting up accounts, the profitability of the company, and the future of **Twitter**.

The Future of the “Book” in Light of the Present Rise in “E” Publications — Presented by **Joyce Dixon-Fyle** (Coordinator of Collection Development, DePauw University)

Reported by: **Ava Iuliano** (SLIS Student, University of South Florida) <aiuliano@mail.usf.edu>

Dixon-Fyle delivered a provoking presentation that read much like an academic poster session. Starting with a literature review of three different articles that described the fate, need, or disuse of the “book” in the age of e-publications, **Dixon-Fyle** discussed divergent views of the future of the book, from suppositions that the end of the book is at hand to the claims that the book is an educational artifact that prevents the fragmentation of knowledge. **Dixon-Fyle** provided a very thorough interpretation and delivery of her literature review, although it may have been at the expense of the opportunity for audience participation. Questions of the future of the book are near and dear to the soul of librarianship; in provoking our fears of disenfranchisement and permanent death of the physical text as we know it, **Dixon-Fyle** produced a number of thought-stirring questions regarding the future of the book during the rise of e-publications.

Cutting the “Fat” CAREFULLY - A Collection Development Model — Presented by **Peggy Kain** (Electronic Resources Librarian, University of Alabama at Birmingham)

Reported by: **Leslie Farison** (Appalachian State University) <farisonll@appstate.edu>

Most attendees of this standing room only presentation, more accurately entitled, *Cutting the [Non] “Fat: Carefully A Collection Development [Retrenchment] Model*, left this session exuding gratitude that their institutions had not been as ravaged by budget cuts as the **University of Alabama**. The libraries are working with a significantly smaller materials budget that they had three years ago. To guide cancellation decisions a spreadsheet was created containing all serials and electronic resources and corresponding price and usage data for each. Subject librarians reviewed the information and made recommendations which were sent to the deans of the academic units for distribution to teaching faculty. In some cases where databases contained content that was duplicated, one had to be eliminated even if usage was high. **UAB** is not currently buying any monographs and has opted out of the big journal packages in favor of single title subscriptions.

Journals are evaluated in a matrix containing four quadrants based on use and cost. **UAB** is currently evaluating other ideas to allow the libraries to cut costs without losing content, including encouraging publishers to find creative solutions and pay-per-view options for buying single articles from a vendor. A PowerPoint of the presentation is available at <http://www.katina.info/d/2009presentations>.

Concurrent 1 — Friday, November 6, 2009

Start Worrying about the Theft of Shelf Books and Media
— Presented by **Robert P. Holley** (Professor, School of Library & Information Science, Wayne State University)

Reported by: **Rob Tench** (Old Dominion University Libraries) <ftench@odu.edu>

Our collections may be more at risk than we think, according to **Dr. Holley** an often cited researcher on the out-of-print book market and Internet bookseller since 2005. In an engaging, relaxed, and informative style, he made a convincing case that library materials are much more vulnerable to theft than ever because of the exploding Internet book trade.

Patron and staff theft remain a consistent and pervasive problem. However, some very ingenious ways to separate materials from library ownership have evolved. False checkouts, ILL abuse, and intentional staff weeding of valuable titles were cited by **Holley**. Thieves will purchase discard stamps and attempt to peddle items as withdrawn materials or gladly pay standard replacement fees so they can sell the titles for hundreds more online. Gifts are particularly vulnerable because less attention is paid to them, and they often are stolen during pickup or while on gift shelves.

Holley recommended several strategies to avoid theft including limiting checkouts for new patrons, billing actual replacement costs, evaluating ILL requests for valuable materials, and having a collection development expert look at discarded materials. He also suggested processing new and gift titles quickly, restricting access to media materials, and installing security cameras in the stacks.

Be vigilant — our collections are constant targets!

Conflict Management, Megaphone Mastery, and Tea with the Queen: Running a big staff training program on a very small budget — Presented by **Pat Van Zandt** (Director of Research, Instruction & Outreach Services, College of William and Mary)

Reported by: **Ann M. Watson** (Ohio University – Lancaster, Hannah V. McCauley Library) <watsona2@ohio.edu>

Van Zandt delivered an engaging presentation on how libraries can boost staff morale even during times of serious budget cuts. The **Earl Gregg Swem Library** at the **College of William and Mary** found itself facing budgetary cuts of 32% during the course of eighteen months which caused great stress among the staff. A committee was created and charged with developing an inexpensive staff training and development program to improve morale and staff efficiency. The committee commissioned an outside faculty member to survey individual library staff to discover core values. Survey results included dedication to excellent customer service, desire for more training, and intellectual stimulation and variety in their jobs. With a small budget of \$1,000 the committee planned work-related training and programs including effective performance management, the **Google Book Project**, Blogging, Web 2.0, **Vista**, **Excel**, time management, and safety training. The committee found interesting outside trainers and speakers who charged little or nothing and were excited to share information with the library staff. Workshops related to healthy living were organized including relaxation, caring for aging parents, how to write a Living Will, and belly dancing. Additional initiatives included visiting various campus departments such as the campus pastry chef. Library staff was also invited to share personal interests such as collecting Valentines and horseracing. **Van Zandt** stressed some important tips to ensure successful programming at your library: Get administrative support and if possible a very small budget; organize with a committee; plan for what the staff wants; vary times of events so all can participate; and use your imagination!

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A Necessity: Outsourcing the Issues of Print Serials — Presented by **Heather D'Amour** (Head, Technical Services and Digital Access, University of Calgary); **Ada-Marie Atkins Nechka** (Associate University Librarian, Collections & Technical Services, University of Calgary)

Reported by: **Sharon Dyas-Correia** (University of Toronto Library)
<s.dyas.correia@utoronto.ca>

In this interesting session, **D'Amour** and **Atkins Nechka** discussed how, in response to the ever increasing demands of digital collections on the acquisitions department, the **University of Calgary** in Alberta, Canada has begun using "serials consolidation services" offered by a major vendor. The library has begun outsourcing the receipt, claiming, and physical processing of 1,000 print serials. After a time-motion study and an examination of many issues, the library decided to develop a "shelf ready" vendor-included journal process in order to improve service. After considerable planning and collaboration, titles were selected for the service, issue mailing addresses were changed, physical processing was decided upon, and workflow processes were established. The project has been successful and, as a result, the library plans to transfer more titles to consolidation services, continue to refine procedures, possibly eliminate all check in, outsource standing orders, and implement EDI invoicing. The changes are expected to free staff for re-assignment to other projects related to the demands of the digital library. The presenters concluded by indicating that, in order to successfully complete the process open communication, staff involvement and collaboration are essential.

Good Enough: The New Face of Reference — Presented by **Doug Way** (Head of Collection Development, Grand Valley State University); **Colleen Lyon** (Science Librarian, Grand Valley State University)

Reported by: **Heidi Buchanan** (Western Carolina University, Hunter Library) <hbuchanan@wcu.edu>

Whenever people use "good enough" and "reference" in the same sentence, my left eyelid starts twitching. However, **Way** and **Lyon** gave strong arguments for moving from print to online reference collections such as **Oxford Reference Online**.

The presenters listed time constraints on librarians as part of the reason to move toward purchasing online reference collections instead of selecting specific print or online titles. Other (more convincing) arguments included:

- **Increased access.** Many print volumes were moved from the reference section to the circulating stacks, so users could check them out. Online reference titles can be found in the library catalog or in research guides, etc. Multiple users can access an online resource at the same time.
- **Disintermediation.** A single search box allows patrons to search by topic; they don't need a librarian to tell them which specific resource to consult.
- **Affordability.** "Bundled" resources like *Credo* reference are cheaper than purchasing individual titles.

The presenters concluded that use is key: online resources, as well as books in the circulating collection, will be used more often — thus the resources are "good enough."

Interactive Online Reference — Presented by **Tom Beyer** (Director of Publishing, iFactory); **Sue Polanka** (Wright State University and No Shelf Required blogger)

Reported by: **Regina Koury** (Idaho State University, Eli M. Oboler Library) <kourregi@isu.edu>

Beyer and **Polanka** conducted a truly interactive session, by handing out clickers to the audience to answer the survey questions during their pre-

sentation. The survey questions ranged from "how often do you use online reference products" (47%) to "would patrons use these features" (89% for *Did you mean?* and saved searches). Both publishers and librarians want the ultimate online interface, giving the patrons ability to interact with and manipulate the content. There are interactive online reference features out there already: reading text to user and translation (**Gale Virtual Reference**), video clips and animation (**YouTube**), maps and timeline (**UCLA Encyclopedia of Egyptology**), and visual mapping (**Credo Reference**). **Polanka** shared the results of the online survey of the 30 interactive online reference options done in late October to 14 vendors and 104 librarians. The most favorable feature was a spelling suggestion: *Did you mean?* followed by citation builders, a single platform for searching all content, and availability for mobile devices viewing. The least favorable features: social networking within database, linking to social networks, visual searching, and sharing teaching aids. More of the results of the survey and the presentation can be found on **Polanka's** blog: <http://www.libraries.wright.edu/noshelfrequired/?p=384#more-384>.

A 5-Year Domestic Monograph Collection Assessment in Illinois Academic Libraries: Use Analysis by Subject and Publisher — Presented by **Tina Chrzastowski** (Chemistry Librarian, University of Illinois at Urbana-Champaign); **Lynn Wiley** (Head of Acquisitions, University of Illinois at Urbana-Champaign); **Stephanie Baker** (Research Programmer, University of Illinois at Urbana-Champaign)

Reported by: **Cathy Goodwin** (Coastal Carolina University, Kimbel Library) <cgoodwin@coastal.edu>

Who says librarians are afraid of math? Not collection management librarians, and certainly not these presenters, who "did the math" to study patron use of new domestic titles purchased by Illinois' academic library consortium between 2004-2008. With a grant from **CARLI (Consortium of Academic and Research Libraries in Illinois)** to assess borrowing and lending between libraries, identify top publishers, and examine overlap in the shared collection, **Wiley**, **Chrzastowski**, and **Baker** looked at use data for five million bibliographic records in 57 Illinois academic libraries. They found that 17% of the shared collection never circulated, 79% circulated more than once, and the remaining 4% circulated once between 2004-2008. They found a strong correlation between use and purchasing: LC subjects with highest level of purchasing also received highest use. The authors calculated rate of use by publisher, with the suggestion that the consortium may want to eliminate zero or low-use publishers from approval plans. Title overlap would be expected across 57 libraries, but how did high vs. low overlap affect cost per use? High overlap correlated positively with high use, and low overlap correlated with low use. The mid-range of overlap in titles (7-19 copies) had low use as well, presenting an opportunity to re-examine purchase of these materials.

Key Challenges Facing Researchers in the Global Research Environment: An Analysis of Researcher Behavior in Europe, USA and Asia — Presented by **Boe Horton** (SVP, Research Solutions, ProQuest)

Reported by: **Deb Thomas** (University of Tennessee, Hodges Library) <dthomas2@utk.edu>

Soon China will have the largest population of post-secondary students and faculty in the world. In 2008 **ProQuest** and **CALIS (Chinese Academic Library and Information System)**, a nationwide academic library consortium surveyed 875 Chinese graduate students and faculty to find out how these scholars communicate with each other and with researchers in the United States. Chinese researchers displayed strong interest in developing contacts in the West and in publishing in Western journals and rely on their mentors to help them achieve these goals. Mentors were considered the most important information source in keeping informed about conferences and as most helpful in getting published in U.S. journals and in establishing contact with Western colleagues. Chinese researchers felt that libraries did a good job in providing traditional services, but they indicated a role for libraries in helping with translation services and developing professional contacts.

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Rethinking Monographic Acquisition: Developing a Demand-Driven Purchase Model — Presented by **Michael Levine-Clark** (Collections Librarian, University of Denver); **Stephen Bosch** (Materials Budget, Procurement, and Licensing Librarian, University of Arizona Library); **Kim Anderson** (Chief Bibliographer, Blackwell); **Matt Naumann** (Director of Publisher Relations, Blackwell)

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

At the **University of Denver**, the library always bought books just in case, and for many reasons they wanted to allow users to purchase books from a larger universe of titles. They conducted a pilot project for the demand-driven model in the humanities and continued to run the approval plan for other disciplines.

At the **University of Arizona**, they wanted to change the model to test their return on investment and because circulation rates were low. They used the existing approval plan profile as the template for the demand-driven model. Users clicking on the titles in the OPAC triggered the purchase.

Blackwell presented the vendor perspective for the **Demand-Driven Purchase Model**, asking libraries to consider what titles they would use to populate their OPAC. Would it be best to have the broadest collection possible or a more controlled universe?

Presenters discussed the implications of the **Demand-Driven Purchase Model**: Will this model increase cost-per-title and reduce number of published titles? Or, will it result in increased book sales, resulting in the simultaneous release of print and eBooks? It is also possible that the **Demand-Driven Purchase Model** has the potential to replace broken distribution models with models that work better for all parties.

Publishers Discuss How Today's Weak Economy Impacts Editorial Programs — Presented by **Niko Pfund** (VP/Publisher, Oxford University Press); **Peter Balis** (Director of Digital Content Sales, John Wiley & Sons); **Bob Boissy** (Manager, Agent Relations, Springer-Verlag); **Erin Igoe** (Library Sales & Marketing Manager, Cambridge University Press)

NOTE: Carolyn Morris (Director of US Sales, Coutts Information Services), did not participate in this panel presentation.

Reported by: **Rachel Lee** (University of California Press) <rlee@ucpress.edu>

Publishers from **Springer**, **OUP**, **John Wiley**, and **CUP** shared their thoughts on the current economic crisis and discussed ways in which their respective companies were adapting to a new situation.

Pfund (OUP) argued that more information was not necessarily better, and stressed that the company was balancing "vision vs. self-interest." **OUP** is publishing to give people what they want, not to crowd the market with more information.

Balis (John Wiley & Sons) outlined the changes in the **Wiley** systems and processes that were accelerating the support for eBooks as the predominant book publishing format.

Boissy (Springer) asserted that even in a dwindling market one could still aim for as much of the market share as possible. **Springer's** main area of growth now is eBooks, rather than journals. While print is associated with prestige and tradition, electronic books allow for easier access, speed, and functionality. eBooks also allow for greater monetization of marginal products.

Igoe (CUP) said the company had been very selective about price increases and were also reconsidering reader requirements. **CUP** was also looking at partnering from within the university and plans to reissue some of the university's historic publications. Finally, the **Press** was assisting **Cambridge University** with the creation of a digital archive.

Collaboration, the Mother of Innovation: Are Librarians and Publishers Collaborating to Utilize Technology to Improve Collections and Save Money? — Presented by **Jackie Zanghi-LaPlaca** (Director of Electronic Databases, IGI Global); **Lia Hemphill** (Director of Collection Development, Nova Southeastern University); **Jim Dooley** (Head, Collection Services, University of California, Merced); **Heather Blaine** (Sales Marketing Manager, Credo Reference)

NOTE: Tim Turner (MyiLibrary) and Victor Lao (Springer), did not participate in this panel presentation.

Reported by: **Healthier S. Miller** (SUNY Albany) <HMiller@uamail.albany.edu>

Collaborative undertakings between librarians and publishers, sometimes at odds, are now especially critical, spurred on by the transition to electronic resources. Speakers described a number of collaborative ventures. **Dooley** noted publishers adding to collaborative archives such as **Portico**. He noted also that ten **UC** libraries are investigating combining technical services operations, while stating that disruptive technologies also disrupt relationships and present challenges including **ILL**, licensing, scholarly usage, multiple platforms, and multiple business models. **Hemphill** described collaboration between the library and county government to provide library services to county residents. She also described intense marketing of e-resources on campus. The library invited 32 vendors of e-resources to spend a day on campus collecting input from users regarding how their products are used. **Blaine** noted publishers' use of librarian advisory boards, focus groups, surveys, conferences, webinars, and social Web applications. **LaPlaca** described the Library Technology Cooperative's aiding academic libraries with the transition to e-resources, encouraging libraries to use technology for marketing, creating a knowledge base of publisher interfaces, and highlighting library success stories. An audience member spoke to the need of all libraries for their own high resolution logos that can be put in e-resources, clearly visible and printed on every page.

How to Write an Acquisitions Procedures Manual — Presented by **Arlene Moore Sievers-Hill** (Head Acquisitions Department, Case Western Reserve University, Kelvin Smith Library)

Reported by: **Christine Ross** (University of Illinois at Springfield, Brookens Library) <cmross1@uis.edu>

Moore turned a rather dry and arduous task into a fun and helpful presentation. All acquisitions librarians aspire to write a concise and useful procedure manual, and **Moore** provided motivation and tips for doing so. The procedures manual serves many functions: it assists in the training of new staff or new librarians who likely didn't learn about the nuts and bolts of acquisitions functions in library school, it helps distinguish the acquisitions procedure from other library functions, and memorializes processes for administration. She encouraged the involvement of all staff in the planning and drafting manual and the incorporation of vendor produced step-by-step methodologies where available. Finally, a plan of consistent and regular review of the manual was highly recommended.

Communication and Collection Accountability through Clusters: Case studies from two institutions — Presented by **Meris Mandernach** (Collection Management Librarian, James Madison University); **Carla Lee** (Director, Science, Engineering & Education Services, The University of Virginia)

Reported by: **Miranda Bennett** (University of Houston, M. D. Anderson Library) <mhenry4@uh.edu>

This session featured two enthusiastic presenters describing for a small but attentive audience the subject-based approach their libraries have taken to organizing librarians with collection development responsibilities. **Lee** talked about the way her libraries' organizational structure is now based on "clusters" defined by broad academic disciplines, which have allowed her to formalize subject-based representation on collections committees,

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and **Mandernach** discussed the development of subject-based clusters that focus solely on collection development. After laying out the way clusters function in their respective libraries, the presenters summarized the pros and cons of using this type of structure, including the advantages of improved communications, greater subject librarian buy-in and willingness to contribute, and more representative decision-making procedures, and the drawbacks of more meetings (including UVA's biweekly "Festival of Collections"), extra layers of bureaucracy, and dependence of the abilities and interest level of the "collections coordinators" (cluster leaders). **Lee** and **Mandernach** also looked to the future of the cluster-based approach and noted that they would like to improve assessment and training but are generally satisfied with the cluster model and plan to keep it in place.

Cooperative Collection Development: Sharing Funds, Resources, and Responsibilities Across Libraries — Presented by **Kay Downey** (Collection Management Librarian UL, Kent State University); **Melissa Spohn** (Head, Acquisitions and Serials, Assistant Professor, Kent State University Libraries);

Rob Kairis (Library Director, Kent State University at Stark)

NOTE: **Michael Walmsley** (YBP Library Services), also participated in this panel presentation.

Reported by: **Ava Iuliano** (SLIS Student, University of South Florida) <aiuliano@mail.usf.edu>

Downy, Spohn, and Kairis spoke about how **Kent State University's** eight library system undertook a decision to streamline collection development by combining the selection and billing process of its eight different campus libraries. With the help of **YBP**, the vendor of all eight libraries, **Kent State** was able to formulate a cooperative collection development plan regarding its **Ebrary** eBook collection in the Nursing field, due to the high demand for current data and the widely-used eBook format. By

examining the previous three years, **Kent State** was able to establish a baseline for expenditures and number of titles purchased. From there, a financial commitment formula was developed in order to steer **Kent** towards spending less. **Kent State** also examined its selection assignments for the different campuses and consolidated the field of "nursing" while allowing specific campuses to select items that support their unique programs. By creating relationships between the campuses to ensure communication and trust, along with the help of **YBP**, which streamlined the purchasing and selection process, **Kent State** was able to lower the rate of duplication as well as the amount of financial commitment while providing a collection of eBooks that effectively supported its curricula. **Walmsley** provide a short presentation on **YPB's** role and fielded some vendor-specific questions from the audience.

Concurrent 2 — Friday, November 6, 2009

What's in your Aggregator?: Content, Currency, and Stability of Full-Text Databases — Presented by: **Mariyam Thohira** (Electronic Serials Librarian, University of Colorado at Colorado Springs); **Mary Beth Chambers** (Catalog/Archives Librarian, University of Colorado at Colorado Springs); **Nancy Sprague** (Reference Librarian, University of Idaho)

Reported by: **Healther S. Miller** (SUNY Albany)
<HMiller@uamail.albany.edu>

Thohira and Chambers described two studies, 1999 and 2009, of abstract/indexing databases with full text at the **University of Colorado** at Colorado Springs. In 1999, such databases were new, popular with students, less so with faculty. Due to budget shortfalls, the library considered cancelling journals in these databases, but found that databases were unstable, none had 100% coverage, and graphics were deficient. Print journals could not be cancelled. (See **Sprague, Nancy and Mary Beth Chambers**, "Full-Text Databases and the Journal Cancellation Process: A Case Study." *Serials Review* 26.3 (2000): 19-31). A similar study was done in 2009 examining

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79 titles across disciplines targeted for cancellation despite known risks. All were available in major online full-text databases, 56% current, 44% with lags (13% with lags were two or more issues behind). No major articles were missing, although other “holes” were found. Graphics were good in PDFs, but deficient in HTML versions. Fifty-three titles were cancelled, including 20 no longer available in subscribed databases. Nevertheless, they concluded that aggregated journal content is not a substitute for subscriptions and noted that publishers are pulling content from aggregated databases in favor of their own journal packages.

Uniqueness and Collection Overlap in Academic Libraries

— Presented by **Michael Levine-Clark** (Collections Librarian, University of Denver)

NOTE: Margaret Jobe (Faculty Director Government Publications, University of Colorado at Boulder) and Sara Holladay (formerly Electronic Collections and Assessment Librarian, University of Colorado at Boulder), did not participate in this presentation.

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

In this presentation, **Levine-Clark** described a multi-institution project spanning nine years utilizing **Library Dynamic's Spectra Dimension** product which sought to examine the correlation of cooperative agreements to build shared collections and avoid the expense of unnecessary duplication in collections. The project recognized that while uniqueness of collections has been a goal of academic libraries, so also has been the development and retention of a core-set of commonly held titles. The project, sponsored by the **Colorado Alliance for Research Libraries**, analyzed the unique materials and collection overlap in the surveyed collections at a variety of institutions. It was found that overall, the size of the institution seem to correlate with a higher degree of collection overlap (51.59%) and that consortia agreements to develop collections in a cooperative manner seem to have little effect on the amount of duplication. In fact, the rate of duplication is about the same as for those institutions not working together, and large institutions duplicate each other's collections at a high rate.

Grappling with Changing Realities — Presented by Lea Currie (Head of Collection Development, University of Kansas Libraries);

Frances Devlin (Head of Library Research Services, University of Kansas Libraries)

NOTE: John Stratton (Business/Economics Librarian, University of Kansas Libraries) and Monica Claassen-Wilson (Information Specialist, University of Kansas Libraries), did not participate in this panel presentation.

Reported by: **Miranda Bennett** (University of Houston, M. D. Anderson Library) <mhenry4@uh.edu>

In this session, **Currie** and **Devlin** presented many of the efforts the **University of Kansas Libraries** are undertaking to address increasing economic hardship, changing patron needs and expectations, and emerging forms of scholarly communications. Their cost-cutting measures have included a “database stewardship program,” an approval plan review, an “ongoing” serials review, and a print purchase-on-demand system. These projects have often involved careful usage assessment to ensure accountability. Their libraries are also experimenting with a variety of eBook options to meet patron expectations of speed and accessibility. The presenters described the development of **KU ScholarWorks**, their institutional repository, and the new emphasis their libraries are placing on digital collections, especially of local materials. They noted that the **University of Kansas** was the first public university to put in place an open access policy, and they see librarians as leaders in the implementation of the policy. Open access sparked some questions and comments from the audience. Drawing on their interviews with library administrators at **KU**, they highlighted several issues on the horizon, such as continuing change; shrinking budgets; lots of assessment; quick, easy, and fast access; increased collaboration; and greater interest in local, unique holdings.

Using Access to Create a Serials Decision Database — Presented by Hana Levay (Information Resources Librarian, University of Washington)

Reported by: **Denise Keating** (SLIS student, University of South Carolina) <keatingd@sc.edu>

In the quest to analyze serials data located in various locations and spreadsheets, **Levay** provided a relational database solution to generate an easy to understand comprehensive report. **Levay** utilized **Microsoft Access** to gather data that included usage statistics, eigenfactor, license terms, payments, and other pertinent attributes. **Excel** spreadsheets were imported into **Access**, thus eliminating the recreation of data values. ISSN attributes did provide a challenge in the data migration to **Access**. The project proved successful in creating fund-level reports containing usage statistics and licensing details. Information is available in one location and accessible by various users requiring serials analysis reports. The finished project was well received by various stakeholders within the university. **Levay** also stressed that a serials solution can be achieved without previous **Access** experience or expertise. Considering the current climate of budget reductions, **Access** provides a usable and cost-effective serials analysis tool for libraries.

Two for One: Linking Cooperative Collection Development with Demand-Driven Collection Strategies — Presented by H. Austin

Booth (Associate Director, University at Buffalo);
Kathleen O'Brien (Collections Development and Public Services Librarian, University of Buffalo)

Reported by: **Dung-Lan Chen** (Skidmore College, Lucy Scribner Library) <duchen@skidmore.edu>

Booth and **O'Brien** presented a series of projects that **University at Buffalo (UB) Libraries** took on in recent years as part of the effort to integrate cooperative and demand-driven collection strategies. The first project presented was their implementation of purchase-on-demand within ILL. **UB** carefully calculated a set of parameters for purchasing titles requested via ILL including all parties involved (ILL, Collection Development, & Acquisitions) instead of borrowing them through other institutions. The pilot was a great success with faster turnaround time for ILL and brand new books for patrons, plus valuable additions to **UB** collection and guaranteed circulation on titles added this way. **UB** is considering expansion of the scale of their Purchase-on-Demand within ILL. **Booth** and **O'Brien** also talked about **UB's** Shared University Press Collection project as well as a Collaborative Collection Development Project that **UB** embarked with **Empire State College (ESC)** which features non-typical ILL practices like fulfilling ILL requests from **ESC** by ordering non-owned titles from **Amazon** and having them shipped directly to **ESC** users at their home or office addresses from **Amazon**. Another unique feature of this project is that **UB** enabled access to two ILLiad clients on one desktop with the help of **OCLC**. The **UB/ESC** collaborative project proved to be another success. Two other projects also presented were “Diversifying SUNY Collections Pilot Project” and WNYLRC's purchase-on-demand pilot program called “Just in Time, Not Just in Case.”

Towards Resolving Chaos in the e-Book Supply Chain — Presented by Brian Green (Executive Director, International ISBN Agency); **Mark Bide** (Executive Director, EDItEUR); **Ann-Marie Breaux** (Vice President, Academic Service Integration, YBP Library Services)

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

Book publishers use ISBNs to identify, differentiate, and standardize titles, to match and overlay records, detect duplication, and to facilitate cross-database linking.

There currently are different ISBNs for the hardcover, the paperback, and the electronic version, and book vendors often create a separate record for each version. This causes problems for selectors when they are ready to order books. When the ISBN rules were revised in 2005, identification by file format seemed adequate. Under the new rules introduced in 2008,

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if publishers don't identify each format with a new ISBN, then the book vendors or libraries can supply their own.

All three vendors represented were interested in receiving feedback from the audience and posed the following question – What do you think is the best solution to the ISBN problem?

What level of granularity best meets *your* requirements?

Generic eBook Identifier?

Identify by Format? (e.g., PDF, epub)

Identify by Platform? (e.g., ebrary)

The audience selected identifier by platform, but only by a slight margin, which highlights the point that the presenters were making — basically, identifiers need to be as granular as everyone needs them to be.

Early Adopters, Early Adapters: Vendors and Libraries Create the Print/e-Book Approval Plan — Presented by **Bob Nardini** (Business Development, Coutts Information Services/Ingram Content Group); **Lia Hemphill** (Head of Collections, Nova Southeastern University) *NOTE: Carolyn Morris (Business Development, Coutts Info Services/Ingram Content Group), did not participate in this panel presentation.*

Reported by: **Jo McClamroch** (Indiana University, Wells Library)
<jmccclamr@indiana.edu>

This presentation reported on collaboration between one publisher and one library regarding the future of eBooks in general and the mainstreaming of eBook acquisitions through approval plans. Such an approval plan could be fully customizable, i.e., a library could prefer the print format in some LC classes, and the electronic in others. Both speakers, **Nardini** and **Hemphill**, agreed that the demand for print books is declining, as evidenced by decreased circulation and fewer orders. eBooks are no longer an esoteric format but rather are an accessible and

preferred format. They suggested that an eBook approval plan should be based on selection profiles just as they are with print books. Various questions were posed: Should both print and electronic versions be published at the same time? How should eBooks be priced? What is an appropriate number of simultaneous users? Are eBooks suitable for patron-driven-acquisitions? More questions will arise as information continues to be collected from **Coutts'** two library partners: **Nova Southeastern University**, and **Arizona State University**.

We Need All The Help We Can Get! – Standards That Assist in Electronic Resources Management — Presented by **Betty Landesman** (Head, Collection Management, NIH Library, National Institutes of Health)

Reported by: **Christine Ross** (University of Illinois at Springfield, Brookens Library) <cmross1@uis.edu>

The room was bursting at the seams to hear about the “alphabet soup of standards” that are available to assist information professionals in the management of electronic resources. **Landesman** reviewed four standards specifically: **ONIX PL**, **CORE**, **SERU**, and **SUSHI**. She provided a general overview of what facet of e-resource collection and management each standard is intended to address and in what stage of development the standard currently stands (whether in active use, in beta testing, or in development). Attendees, most of whom had not yet adopted any of these standards at their own institutions, as indicated by an informal poll, were directed to the **NISO** Website for further information. 🐘

That's all the reports we have room for in this issue, but we do have more reports from the 2009 Charleston Conference which we will continue to publish in upcoming issues of Against the Grain. In the meantime, all the reports that have yet to be published can be found on the ATG Website by visiting <http://www.against-the-grain.com>. Presentation material (PowerPoint slides, handouts) and taped session links from many of the 2009 sessions are available at www.katina.info/conference. You may also visit the conference Website (www.katina.info/conference) for details about the 2010 Charleston Conference. — KS

Reports of Meetings — Society of Southwest Archivists (SSA)

by **Sever Bordeianu** (Head, Print Resources Section, University Libraries, University of New Mexico) <sbordeia@unm.edu>

The Society of Southwest Archivists Annual Meeting —
April 28-May 1, 2010, Santa Fe, New Mexico

Reported by **Claire-Lise Bénéaud** (Associate Director, Center for Southwest Research and Special Collections, University of New Mexico)

The **Society of Southwest Archivists (SSA)** welcomed participants to the Land of Enchantment and the City Different — AKA Santa Fe. 2010 was the perfect time to have **SSA** in Santa Fe. This year Santa Fe celebrates 400 years of history which began with the establishment of the “villa” in 1610 by the Spanish, and which has a vibrant multicultural life today. Santa Fe holds the claim to being the oldest state capital in the United States.

SSA held its 28th Annual Meeting from April 28 to May 1st, 2010 at the Inn and Spa at **Loretto**, a historic hotel famous for its traditional pueblo architecture. Three workshops on the preservation of photographic materials, fundraising, and caring for Native American archival collections took place during the pre-conference. Writer and activist **John Nichols**, whose work of fiction and non-fiction is set in Northern New Mexico, gave the keynote speech. He is best known for his New Mexico Trilogy: *The Milagro Beanfield War* (1974), *The Magic Journey* (1978), and *Nirvana Blues* (1981). It was a most amusing and pertinent address. He told the audience that he was an archivist's dream. He is a packrat and has kept all the things accumulated by himself (every draft of every manuscript, every piece of correspondence that he has sent and received since the 1960s, as well as journals, slides, and artwork), his father, and his grandfather. He keeps all this in a storage locker in Taos. He is most grateful for archivists because he can unload his stuff on them (he is in the process of giving his manuscripts, screenplays, and activity files to the **Center for Southwest Research** at the **University of New Mexico**).

The rest of the program consisted of numerous concurrent sessions which covered a breadth of topics including: archival and historical issues about Route 66, archives training and funding opportunities, the National Digital Newspaper Program (a joint project between the **National Endowment for the Humanities** and the **Library of Congress**), current challenges and initiatives at the **New Mexico State Archives**, preserving and making available small press archives, tribal archives, history of the Mexican American borderland, and the Korean War project at the **Central Arkansas Library System**.

The session title *The Groves of Academe* focused on the job of contemporary archivists in academic institutions. **Mary Manning** of **Texas A&M University** reported on the results of a survey she conducted among archivists and discussed how

they are expected to do outreach, work with the faculty and the community, complete committee work, and how there is hardly any time left to process archives — resulting in large backlogs. **Robin Leech** of **Oklahoma State University** reported on a large digitization project on the history of her campus, and **Terrance Shults** reported on how a new donation of **Thurgood Marshall** materials generated new research and insights into Black history. The paper was interestingly subtitled: *A Case Thurgood Marshall Lost, 1947*.

The session *Las Mujeres at the Pass of the North* was noteworthy. Most archival collection have been traditionally related to men: businessmen, professors, writers, and politicians. In this talk, three archivists, working in special collections at the **University of Texas** at El Paso, discussed their library's resources on women's clubs in El Paso from the late 19th century to today. **Laura Hollingsed** showed how these various groups included prominent women in the community and how they became involved with health issues, education, fund-raising, and women's suffrage. All these organizations generated archives, and she described how current members are volunteering at the archives — and the challenges of working with volunteers. **Abby Weiser** made the point that the records of these women's organizations are a great primary source in understanding the culture, history, and progress of El Paso. Finally **Claudia Rivers** discussed how important it is to continue to collect papers of women's organizations. She gave a useful presentation on how to acquire collections: contacting people, asking for money to process collections, how much to ask for, giving lectures, and wining and dining. She gave great advice on how to schmooze. Nonetheless, she still reflected on the fact that some collections are difficult to acquire, particularly records for African-American and Hispanic organizations in El Paso. The session on Jewish archives in the southwest was fascinating. Writer **Sharon Niederman**, former president and archivist of the **New Mexico Jewish Historical Society**, gave a lively presentation and stressed the point that Jewish history is about the whole community, not just the Jewish community.

The conference was well organized, the hotel was first class, and the breakfast and snacks were excellent. The opening and closing receptions were, in true Santa Fe Style, wonderful. The opening was held at the **New Mexico History Museum** and gave attendees the opportunity to view the exhibits that cover the early history of indigenous peoples, Spanish colonization, the Mexican period, and travel and commerce on the legendary Santa Fe Trail. The closing reception was held in the atrium of the **Museum of International Folk Art** on Museum Hill, another landmark of Santa Fe.

Even though **SSA** covers the following Southwestern states — Louisiana, Arkansas, Oklahoma, Texas, New Mexico, and Arizona — attendees, which numbered 170 this year, came from other neighboring states as well. Next year the **Society of Southwest Archivists** will meet in Little Rock, Arkansas. See you there. 🐘