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And They Were There-Reports of Meetings-2009 Charleston Conference

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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 fourth 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 with the third appearing in *ATG* v.22#4, September 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**

Concurrent 3 — Friday, November 6, 2009

The Evolution of Business Sources: An Environmental Look at Information Providers and a Prediction for the Future or “It’s really not so bad, and it’s gonna get better!” — Presented by **Jean Yaremchuk** (Assistant Professor/Business Librarian, Baruch College)

Reported by: **Timothy Hasin** (College of Staten Island, CSI Library) <Timothy.Hasin@csi.cuny.edu>

Drawing on an extensive background in the corporate world, particularly experience with **Thomson Reuters**, **Yaremchuk** provided an insider's perspective on the creation and delivery of business information. Presenting an overview of the business information environment, **Yaremchuk** detailed the evolution of business information sources within a historical context, and provided an in-depth look at the entities and events that comprise the content of business information. Historically, business information started with individual sources providing limited information on individual entities and transactions, but eventually corporate informa-

continued on page 74

And They Were There from page 73

tion providers, such as **Bloomberg**, **Thomson**, and **Standard and Poor's** began to aggregate information from various sources and acquired smaller niche providers. Today, business information sources and companies can be categorized by the level of aggregation they provide.

Of particular interest was **Yaremchuk's** insightful prediction that the business information sources available to libraries will continue to improve, with premium, complex products becoming more affordable and accessible as a result of increasing competition among large established aggregators, new startups encouraged by acquisitions, and smaller niche players. Following the presentation, attendees engaged in a lively discussion that touched on the limitations of academic products currently offered by business and financial information providers and the far out-of-reach expense of the standard products that contain all useful or necessary features and functions.

It's Raining Cats and Citation Analyses: New uses and audiences for the results of evidence-based collection evaluation

— Presented by **Alison Bobal** (Life Sciences Librarian, Oregon State University); **Andrea Wirth** (Geosciences and Environmental Sciences Librarian, Oregon State University)

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

Two science programs, two citation analyses, many applications. Two science librarians from **Oregon State University** undertook separate citation analysis of graduate theses in veterinary medicine ("cats") and water resources ("rain").

Bobal noticed substantial variation in the citations used by veterinary students in their senior theses, which prompted several questions: Is library instruction adequate for the DVM students? Were they using Websites and grey literature? Were they finding the most current information (as required for their theses)? She studied 150 DVM theses from 2005 to 2009, and coded over 3,000 citations based on type of source and age of material and ownership. She found a 23% drop in journal citations over the five-year period and a slight increase in book citations. She also found a 3% error rate in the citations.

Wirth studied master's theses from the **Water Research Graduate Program (WRGP)**, a fairly new program at **OSU**. Based on the initial library needs assessment of the program in 2003, **Wirth** and colleagues wanted to know if the resources recommended for the program were being used by the student researchers (i.e., did students use the same resources as established water researchers?) and to determine how well the **OSU** libraries were meeting the research needs for this very interdisciplinary program. Both analyses have implications for library instruction, development of research guides, and cancellation decisions.

Streamlining the Materials Ledger to Reflect the Realities of Campus Demographics, Collection Use, and the Increase in E-Resource Expenditures

— Presented by **Anne C. Elguindi** (Acting Director of Information Delivery Services, American University Library); **Kari Schmidt** (Electronic Resources Librarian, American University Library); **Michael A. Matos** (Business and Economics Librarian, American University)

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

After carefully examining changes in university programs and enrollment, changes resulting from a reorganization of the library and shifts in spending from print to digital over the past decade, **American University Libraries** addressed the need to streamline their materials ledger. The presenters utilized a number of very illustrative charts and graphs to demonstrate these changes. They created four potential models for reworking the content side of the ledger: one model that focused

on the subject, one model with a focus on the primary split of format (print, electronic, etc.), one model that attempted to combine the best qualities of the first two models, and one model that was simply a general expansion of the serials portion of the ledger. All models broadened the electronic side of the budget in some way, adding such top-level areas as eBooks, databases, and digital collections. A PowerPoint of the presentation is available at <http://www.katina.info/d/2009presentations>.

Cost/Benefit Analysis of BioMedCentral Membership at a Large Medical Research Institution

— Presented by **Susan Klimley** (Serials and Electronic Resources Librarian, Health Sciences Library, Columbia University)

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

Klimley's challenges and findings resonated with research institution libraries that serve the biomedical and life sciences community. (See conference plenary presenter **Phil Davis's** entry: <http://scholarlykitchen.sspnet.org/2009/11/09/open-access-memberships-are-libraries-paying-too-much/>, in a blog sponsored by the **Society for Scholarly Publishing**.) At the session itself, the view outside the lovely Bridgeview Room distracted no one as presenter **Klimley** shared her findings, tracking 65 papers authored by her institution's authors, weighing the library's **BioMedCentral** membership payment against the presumed savings for her institution's submitting authors. Challenges arose identifying the institution's authors (and their co-authors' institutional affiliations) and which author (institution) should be (and could afford to be) charged author fees. Her possible recommendation to cancel / change the membership level was further complicated by her institution's entry, with five other institutions, into the **Compact for Open-Access Publishing Equity (COPE)**. **Klimley's** conclusion? The costs of publishing have to remain with the people who are producing the research. Author publishing funds (such as **COPE**) using library budgets are not the answer. The small but attentive group of attendees shared their own stories, with some indicating that early on, at their institutions, it was decided that the library was not going to pay memberships or author fees.

Statistics: The Perks, Perils and Pitfalls — Presented by **Christine M. Stamison** (Senior Customer Relations Manager, Swets); **Nick Niemayer** (Site License Manager, Annual Reviews); **Cory Tucker** (Head, Collection Management, University of Nevada - Las Vegas)

Reported by: **Alexis Linoski** (United States Naval Academy) <linoski@usna.edu>

The session opened with **Stamison** presenting the basics of **COUNTER**, the requirements for compliance with version 3.0, and a review of the required reports – Journal 1 and Journal 1a. There is also a **COUNTER** report for eBooks. This was followed by a short, interactive **COUNTER** knowledge quiz.

Niemayer followed with the Pitfalls:

- While Journal Report 1a is exclusively Legacy content, the definition of Legacy content varies by publisher.
- Turnaway reports actually report the number of users turned away due to exceeding the number of concurrent users licensed rather than the number of users turned away from unsubscribed content, which is a common misconception.
- To account for all usage for specific journal titles, usage from the publisher and from aggregator database subscriptions must be combined.

If usage is particularly low, **Neimeyer** offered suggestions for determining why. He also reminded attendees that publishers can usually provide a report that shows denial of access to unsubscribed content.

Tucker presented ways his institution uses usage statistics as part of their review process for electronic resources. He emphasized that

continued on page 75

And They Were There from page 74

they did not strictly rely on usage numbers, but also considered faculty usage and grant awards, faculty publications, and overlap/duplication.

Let Me See That e-Book: Managing Cataloging and Access through Collaboration — Presented by **Aaron Wood** (Metadata Librarian; Manager, Bibliographic Services, University of Calgary, Libraries and Cultural Resources); **Anne Harris** (Director of Partner Relations, ebrary, Inc.); **Jim Shetler** (Vice President, Library Technical Services, YBP Library Services); **Aron Wolf** (Data Acquisitions Editor, Serials Solutions)

NOTE: *Nicole Pelsinsky* (Senior Product Manager, Serials Solutions), did not participate in the panel presentation.

Reported by: **Wendy West** (SUNY Albany)
<WWest@uamail.albany.edu>

Speakers described the challenges that each organization faced in a collaborative effort to provide access and discovery for eBooks through the **University of Calgary OPAC**. **Wood** cited challenges including extremely large volume of eBooks available, varying cataloging and metadata standards, numerous channels for eBook records, maintenance for volatile collections, keeping up with Website changes, lack of a reliable unique identifier, staffing and sustainable workflow.

Shetler presented challenges from a vendor's perspective. They see their customers as being OPAC-centric, demanding high-quality MARC records, a product that can easily dovetail into existing workflow, and products that are low-cost or free. Vendors' challenges include evolving national standards for cataloging, inconsistent application of standards from customer to customer; varying local requirements, and immediate access to digital objects.

Wolf noted the complexity of managing dual-hosted content, need for normalized metadata, complexity of managing multiple platforms, and the need to standardize information access platforms. He suggested focusing on alternative models (Open Link Resolvers, A-Z lists, federated search, unified discovery platforms, directing Web searches back to the catalog). Publishers, vendors, and libraries need increased communication and partnerships for product development and an increased availability of front list titles as eBooks.

Where Has All the Money Gone? Long Time Passing
— Presented by **Julia Blixrud** (Assistant Executive Director, Scholarly Communication, Association of Research Libraries)

Reported by: **Mike Diaz** (ProQuest) <Mike.Diaz@proquest.com>

Blixrud's session was intended to follow stimulus dollars flowing into higher education and to examine the recent trends. She started by mentioning that American Recovery and Reinvestment Act of

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2009 Website figures at www.recovery.gov indicate that \$11 billion in stimulus funding had been released to higher education to date. While this number looks impressive, **Blixrud's** assessment was that stimulus impact for the higher education institutions, and hence libraries, has been minimal, in large part due to recent focus on supporting laboratories and "shovel-ready" projects.

Next, **Blixrud** discussed budget trends and expectations within the **ARL** membership. In the 2009 **ARL** annual budget survey, more than half the **ARL** membership indicated that they were experiencing budget cuts, with both public and private institutions experiencing funding reductions. In order to manage these budget shortfalls, **ARL** members are reallocating resources, reorganizing staff, renegotiating contracts, updating policies, and re-examining their operations across the board.

continued on page 76

And They Were There
from page 75

The Q&A highlighted a number of other measures in use that are aimed at driving efficiency — cooperative collection development across consortia to reduce costs for duplicate materials and consolidation of service points (ILL/Circulation/Reference).

Copyright on Campus: Coordinating the Confusion

— Presented by **Christine Ross** (Director of Collection and Research Services, University of Illinois at Springfield)

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

Copyright on campus, particularly in the “digital age,” is a confusing morass of laws and “fair use” that is daunting for faculty, students, information technology specialists, and librarians. When **Ross**, who is a licensed attorney as well as a librarian, joined the library staff at **UIS**, she realized quickly that the library had to be in the forefront of supporting copyright and fair use, and that the library could not do it alone. She and a campus-wide group of associates formed the Copyright Compliance Coordinating Committee, which was formally recognized on campus in 2009. C4, as it is called, is made up of representatives from Information Technology, the Center for Online Learning and Research, and the Library. **Ross** is the Chair.

UIS is a small, liberal arts university that has experienced 80% growth in enrollment in seven years, with over 300% growth in graduate and undergraduate online learning. The charge of C4 is to help the campus community understand how they can use electronic materials in teaching and learning. Specifically, they educate people posting digital materials to courseware and reserve, incorporating media into course projects, and the use of streaming media in the classroom. She addressed the Teach Act at length. **Ross**’s showed the audience the guidelines that C4 has put up on the **UIS** Website and explained how they work with faculty and students. **Ross** is a lively and engaging speaker, and the audience had many stories to relate about their experiences.

e-Duke Books: What Have We Learned? — Presented by **Michael McCullough**, Moderator (Sales Manager, Duke University Press); **Lois Schultz** (Original Cataloger, Monographic Cataloging Section, Duke University Libraries); **Tammy S. Sugarman** (Associate University Librarian for Research Services, Georgia State University Library); **Ann-Marie Breaux** (Vice President, Academic Service Integration, YBP Library Services)

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

This interesting session provided insight regarding the inception and delivery of a collection of eBooks. **McCullough** opened the session by providing a review of the **e-Duke Books Scholarly Collection**, namely, its scope, its target users, and key statistics used in the decision to create and disseminate an eBook collection. What made this session different from other sessions was the breadth of perspectives. The audience heard from the technical aspects of the eBook collection through **Schultz**’s very engaging presentation on the cataloging issues inherent in eBook collections. Voicing the perspectives of the buyer, **Sugarman** was detailed in her account of how **e-Duke** and **YBP** provided technical and customer support during their growth and development, including billing problems and trouble-shooting. Finally, **Breaux** spoke about the project from the point of view of a vendor, giving key insights as to how an eBook collection is marketed and delivered. **McCullough** finished the presentation with a summarizing analysis regarding what worked and what **Duke University** would have done differently, most of which were issues of communication and organization. Throughout the session, the audience was able to gain insight regarding the relationships and issues in creating, producing, and distributing an eBook collection from many different points of view.

What We Learned From Users: Lessons learned from our student and librarian users — Presented by **Nancy King** (Product Director, Credo Reference); **Kristina DeVoe** (English & Communications Librarian, Temple University)

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

This two-part session began with a summary of **Credo Reference**’s interface assessment project, in which **King** highlighted several lessons learned, including a recommendation of **Morae** testing software, the importance of involving students with varying experience levels, their success recruiting student test subjects on **Facebook**, and a suggestion that those running the test remain silent during the process. The audience showed interest in the details of user testing, such as the testing environment and the amount offered to student testers (\$40 brought in underclassmen; \$75 was necessary to entice juniors and seniors).

The second part of the session featured librarian **DeVoe** enthusiastically recounting her experience developing, with the help of her library’s digital services librarian, a “library content package” of specialized library resources that could be sent directly to professors to upload into their Blackboard course pages. The project began with a focus on distance courses, and librarians assembled these “gifts” for all distance classes, although they were unable to measure the rate at which professors actually used the content packages. Based on anecdotal evidence, however, they are expanding the project, called “Library Express,” and trying to generate better statistics, increase content options, and make the packages more editable.

Ten More Accounting Textbooks! Turning Those Unwanted Gift Books into Good Donor Relations — Presented by **Thomas A. Karel** (Collection Development Librarian, Franklin & Marshall College Library)

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

Receiving a gift is normally a good experience — except when it clutters a space-conscious library. In his session, **Karel** addressed the pros and cons of receiving gifts and gave some strategies/guidelines for how to handle both the gift and the accompanying donor. The first part of his talk discussed his experience working with donors and learning how and when to say no to potential gifts. Specific, practical examples were given on how to deal with gifts from retired faculty and alumni, particularly if their collection has deteriorated or lacks strong resale value. **Karel** continued by broadly discussing the reasons libraries accept gifts. The second part of the session focused on the benefits gifts can bring to both a library and a school’s development office, particularly if these two groups are collaborating often. Before allowing for questions and comments, **Karel** provided some guidelines for a gift collection policy. Some examples included being selective of the items taken and avoiding special conditions that may cause excess work for library staff. The question and comment portion became a sharing time among the attendees on how each library deals with gifts, with the liveliest discussion related to appraisals.

Afternoon Plenary — Friday, November 6, 2009

Open Access: Readership and Citations — Presented by **Phil Davis** (Ph.D. Candidate, Department of Communication at Cornell University)

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

Davis, former librarian (“recovering librarian,” according to his librarian mother-in-law), now a PhD student, was happy to again be in

continued on page 77

And They Were There from page 76

Charleston. He spoke of Open Access as a model, not “all things to all people” and said “It’s disingenuous to tell people (researchers) that they will get cited” (if their articles are free OA). The “OA citation advantage” appears to be the result of selection (better articles are made freely available), and not access. There are many benefits from free access to the scientific literature, but a citation advantage is not one of them. Prior to making these concluding points, he took attendees on a whirlwind tour of his exhaustive research on readership (article downloads) and citation patterns, conducted since 2007, with publisher cooperation. His site (<http://confluence.cornell.edu/display/~pmd8/resume>) contains a list of projects and publications, including those related to this specific topic, research which will continue for one more year, and will include hybrid journals. **Davis** maintained attendees’ attention and fielded many questions during the late afternoon time slot he was assigned — Is there a difference in disciplines? Is there a 12-month effect/“bump,” with a latent effect after that? Aren’t citations an indication of reward and value of the article?

Morning Plenaries— Saturday, November 7, 2009

Hyperlinked Library Service: Trends, Tools, Transparency — Presented by **Michael Stephens** (Assistant Professor, Graduate School of Library and Information Science at Dominican University)

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

In case we were not aware of how much our world has changed, **Stephens** showed the “Did You Know 4.0” presentation from the recent Media Convergence Forum (<http://www.youtube.com/watch?v=6ILQrUrEW8>) which emphasizes technological change and its rapidity. **Stephens** urged the audience to embrace technology, connect with users, and facilitate user contributions, aiming for a transparent library that is open, listens closely to users and staff, and speaks in a human voice. He cited a number of libraries doing just that and noted that local creators, experts, and collections that are connecting to users (e.g., via blogs) make users care. We must focus on constant and purposeful change, choosing sustainable options (e.g., open source) while standing on our core values of service and stewardship. Ask users what they want, try some emerging tools and see what fits, experiment, measure progress in order to learn how to use the social networking environment in libraries. He noted that we need to be nimble and accept an occasional failure. Overall, he exhorted librarians to “bring your humanity with you.”

Lightning in a Bottle: Libraries, technology and the changing system of scholarly communications — Presented by **Kevin Smith** (Scholarly Communications Officer, Duke University)

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

Smith tried to predict the future (almost guaranteed to be wrong) and share bromides (obvious truths). He’s a lawyer and librarian, and as solo scholarly communications officer at **Duke**, he sometimes feels like a mineshaft canary. How long can the journal crisis last? It’s now been 30-40 years. The photocopier era copyright law is ill-suited for the Internet age, and business models clash. The importance of licensing?

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Growing, and yet it may facilitate use. The “printed artifact?” Some researchers see the value of formal publication for promotion and tenure, but seldom use it for actual scholarship, replaced by digital scholarship. The future? Librarians and library services — less homogenized, more tailored to local needs and conditions; more emphasis on local, born digital content. Services: more important than content, and access: “added value.” New expertise and skills application? Legal (copyright, licensing); Technological (project management, digital collection curation, preservation, creation of metadata); Subject expertise (peer-review process management); Advocacy (**Smith** shared two instances when his blog postings, library.duke.edu/blogs/scholcomm/, raised awareness). Bromides? Listen carefully, respond to local concerns, try pilot projects — “start small, but start.” Session participants debated our roles (“librarians are not physicians”), emphasizing that publishers make different decisions regarding authors than do institutions.

*That’s all the reports we have room for in this issue. Watch for the final batch of reports from the 2009 Charleston Conference, which should appear in the December-January issue of **Against the Grain**. In the meantime, all the reports that have not been 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. — KS*

Rumors from page 68

clever **Greg Tananbaum** wrote new library and publisher and vendor lyrics for the song **Anything Goes**.

And **Greg** even used **Cole Porter** lyrics to delineate his **Train** column in this issue, p.92. Couldn’t get **Greg** to sing the lyrics himself so we are trying to persuade **Jack Montgomery** to sing at the beginning of the **Conference**. We’ll see what happens. PS — **Just heard from Jack! He is going to do it!** Stay tuned! (pun intended)

The **Group Therapy** in this issue of **ATG** (p.69) is about self-

continued on page 79