Against the Grain

Volume 26 | Issue 4 Article 78

2014

And They Were There: Reports of Meetings

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Recommended Citation
Kubilius, Ramune (2014) "And They Were There: Reports of Meetings," *Against the Grain*: Vol. 26: Iss. 4, Article 78.
DOI: https://doi.org/10.7771/2380-176X.6925

And They Were There

Reports of Meetings — 33rd Annual Charleston Conference

Issues in Book and Serial Acquisition, "Too Much is Not Enough!" — Francis Marion Hotel, Embassy Suites Historic Downtown, Courtyard Marriott Historic District, Addlestone Library, College of Charleston, and School of Science and Mathematics Building, Charleston, SC — November 6-9, 2013

Charleston Conference Reports compiled by: **Ramune K. Kubilius** (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 2013 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, highlighting those that were not printed in the conference's final program (though some may have been reflected in the online program). Please visit the **Conference Website**, **http://www.katina.info/conference**, for the online conference schedule from which there are links to many presentations' PowerPoint slides and handouts, plenary session videos, and conference reports by the **2013 Charleston Conference** blogger, **Donald T. Hawkins**. Visit the conference blog at: **http://www.katina.info/conference/charleston-conference-blog/**. The **2013 Charleston Conference Proceedings** will be published in partnership with **Purdue University Press** in 2014.*

*In this issue of **ATG** you will find the fourth installment of 2013 conference reports. The first three installments can be found in **ATG v.26#1, February 2014**, **v.26#2, April 2014**, and **v.26#3, June 2014**. We will continue to publish all of the reports received in upcoming print issues throughout the year. — **RKK***

THURSDAY, NOVEMBER 7, 2013
AFTERNOON CONCURRENT SESSIONS 1
(continued from previous installment)

Magic of (A)ffective Management — Presented by **Ryan Weir** (Indiana State University)

Reported by: **Derek Marshall** (Coordinator of the Veterinary Medicine Library, Mississippi State University) <dmarshall@library.msstate.edu>

Weir related many personal experiences as a manager from his beginnings as an assistant manager at a restaurant to his current position as Electronic Resources Librarian. His focus was to encourage managers to understand that management is about relationship building. In order to discover what motivates employees, managers must maintain healthy relationships with employees that include trust, value, and security. By maintaining these relationships, **Weir** argued that managers can be more effective in motivating employees to perform at their peak. **Weir**

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proceeded to list employee needs, including the need to feel valued and secure, have opportunities to advance and grow, be trusted and able to trust their supervisors, and have opportunities for promotion and increased compensation. By giving anecdotes for each point, **Weir** added strategies managers could apply to achieve these goals. He stated that managers should have varied motivational and feedback structures that resonate with individual employees. He also reminded the audience that no matter how much an employee wants to separate their personal and professional lives it is difficult to do so. A discussion followed the presentation with attendees sharing their own experiences in a supervisor/supervisee role.

Marketing Academic Library Resources: The Good, The Bad, and The Future — Presented by **Carol Anne Germain** (University of Albany); **Nader Qaimari** (Gale, part of Cengage Learning)

Reported by: **Heather Donnellan** (Elsevier, Science and Technology Books) <h.donnellan@elsevier.com>

This session addressed how librarians can apply marketing tactics used by corporations to promote usage of library resources. **Germain** (Information Literacy Librarian, **University of Albany**) explained how important it is to pay attention to usage because it is not as easy to see a virtual library collecting dust as it is with a physical library. She went on to explain the necessary steps to roll out a good marketing program, from building a marketing plan to assessing effectiveness. She provided some personal examples like working with student associations, having office hours in other places on campus, and working with faculty to create assignments using library resources. She finished by assuring the audience that if your plan is working, you will see results.

Qaimari (Senior Vice President, Marketing, **Gale**) gave the crowd some perspective on how **Gale** is working to assist librarians by providing marketing tools that promote usage. **Gale** recently surveyed nearly 600 librarians asking about their marketing and, based on the responses, built out a suite of tools for libraries like posters, banner ads, flyers, and Website widgets, where librarians can add their own branding.

Both presenters were extremely enthusiastic and provided good examples that left the audience equipped with action items that can be implemented right away.

Resolved: All Librarians Should be Subject Librarians: Implementing Subject Librarianship Across a Research Library — Presented by **Steve Smith** (University of Tennessee); **Deb Thomas** (University of Tennessee Library); **Alan Wallace** (University of Tennessee Libraries)

Reported by: **Robert Matuozzi** (Washington State University Libraries) <matuozzi@wsu.edu>

Technical and public service operations are cohering in many academic libraries, partly as a result of new technologies but also to maximize staff resources in response to retirements and attrition. As Dean of Libraries **Smith** (**University of Tennessee**) noted, the core mission of the academic library consists of learning contexts, research, and collections, or LRC librarianship. This means that professional library staff must be retrained to assume responsibility for a broader portfolio of collection development, reference, and associated liaison services, all of which entails ongoing relationships with the academic community. As **Thomas** and **Wallace** noted, a successful transition to the LRC model requires that scripts and expectations be fully articulated. The fear was expressed that librarians might become fungible. Another concern articulated by **Thomas** was loss of time devoted to previous workloads. **Wallace** stressed the need for coordinated mentoring and training, formalized communication among LRC participants, and empathetic team-building. The **University of Tennessee Libraries'** effort to implement LRC librarianship clearly had important implications. Work flows had to be re-prioritized; policies needed to be reassessed in different contexts; regulative concepts required fresh scrutiny; and finally, the LRC librarian model required integration into performance reviews and evaluations.

Who are the Winners? E-books Consortial Purchasing — Presented by **Helen Henderson** (Information Power Ltd.); **Hazel Woodward** (Information Power Ltd.)

Reported by: **Melissa Goertzen** (Columbia University Libraries) <mjg2227@columbia.edu>

In a dynamic eBook environment, "consortia worldwide are struggling to find sustainable and cost-effective business models for purchasing eBooks." Throughout this session, **Henderson** and **Woodward** discussed results of the **JISC** EBook Consortia Pilot Project, which experimented with a strategy for consortial purchasing. The pilot allowed six academic libraries to purchase engineering eBooks from six publishers on a title-by-title basis; whenever one library purchased a title, the others were provided with automatic access.

Findings indicated that overall usage rates of purchased titles were high. 98.6 percent were used by at least one library in the consortium. As a result, all libraries received more value than they purchased. Also, the titles bought and not used by individual libraries averaged at seven percent, a "rate that is very low compared to recent PDA/evidence-based studies in Germany and the USA which were closer to 85 percent."

At the end of the pilot, libraries reported that they would consider consortial eBook purchasing using this model because they received good value-for-money. Publishers were less enthusiastic about the pilot because of the shared ownership of the eBook collection. Although they did not experience a negative financial impact, publishers said a price multiplier would be necessary if they were to participate in the future.

In conclusion, **Henderson** and **Woodward** said that synergy between institutions is the key to developing successful censorial business models. Because of the complexity of these partnerships, they recommend that libraries consider what types of consortia are most compatible with their collection development needs.

THURSDAY, NOVEMBER 7, 2013
AFTERNOON CONCURRENT SESSIONS 2

A Reading of The New Digital Age, by Schmidt and Cohen — Presented by **Joyce Dixon-Fyle** (DePauw University)

Reported by: **Benjamin Sinnamon** (SILS student, University of South Carolina) <sinnamon@email.sc.edu>

The session was an analysis of the book *The New Digital Age* by **Eric Schmidt** and **Jared Cohen**; **Schmidt** is the former CEO of **Google**. The book describes the revolution that the Internet has had on communication and the challenges that this new "age" faces. **Dixon-Fyle** pointed out several shortcomings of the book; the most important being the absence of the library in book's consideration of the digital age. In light of this, **Dixon-Fyle** took questions that the book raises about technology concerning businesses, governments, and individuals and asks them of libraries and librarians — questions like: what are the effects of the Internet on the organization of knowledge, what are the consequences from digitization of books en masse by a single company, is the open access of information a Pandora's box, has the Internet skewed budget allocations? While these questions require more than a conference session to answer, exploring those answers will be vital to continuing the importance of libraries.

Consider this session to be "as advertised" (in the conference program).

Between Two Nerds: Marketing Asks the Techies to Explain Stuff. Very Slowly. — **Jennifer Kemp** (Springer, moderator); **Ladd Brown** (Virginia Tech); **Alexander Brown** (Springer); **Meghan Dowell** (Springer); **Henry Krell** (Springer)

Reported by: **Sallie Morrow** (Swets) <smorrow@us.swets.com>

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Each of the presenters introduced themselves, **Dowell** starting with, "I perform magic…ensuring **Springer** metadata is right all the time." **Krell** agreed that the way the backend works "…is magic, or actually, XML and automation." He explained that the focus was once print first, then create electronic versions later, but today journals are produced "media-neutral" and ready to be viewed on any screen — computer, phone or tablet. Older books need to be scanned in which loses quality, especially photo intensive books.

The panel answered, "What is a discovery service?" by explaining that it's a layer created by a third party to collect publisher metadata to let users search better. **Brown** felt discovery services could give better results. When asked, "What about print on demand?" **Krell** explained that the technology is getting better and cheaper; of the 1,600 books they have, 96% are available as POD, but only 4% are available in full color due to cost. Mathematical formulas were discussed and how they're difficult to render; epub3 was mentioned as being able to support equations. They agreed that the technology is available, but it needs to be utilized.

The panel ended with a quiz for the audience with prizes.

Cost-Per-Use and the Big Deal: The Right Metric for Cancellation Decisions? — Presented by **Tim Bucknall** (UNC Greensboro); **Kimberly Lutz** (ITHAKA)

Reported by: **Margaret M. Kain** (University of Alabama at Birmingham, Mervyn H. Sterne Library) <pkain@uab.edu>

With the rising cost of electronic resources combined with decreasing library budgets, **Bucknall** and **Lutz**, working with other members of the Carolina consortium, decided to look into a cost-per-use [CPU] analysis for member institutions. After some discussion, the working team determined that a time series analysis of the major large contract publishers CPU would be obtained and distributed to member institutions; title-level analysis per CPU would not be used as that analysis would be more appropriate at the institution level. Usage and CPU information was distributed to all of the participating institutions in an effort to help them make an informed decision regarding the renewal of resources. If CPU was $10 or more, the institutions were notified. If the CPU was over $20, the institutions were advised to review this renewal closely; included with the CPU data was a list of 19 reasons of why a resource with "high" CPU should be retained. Three schools with varying missions that participated in the CPU analysis were discussed, detailing how the CPU aided these institutions in the determination of whether or not to remain in a deal or to opt-out.

Emerging Industry Standards: A Primer — Presented by **Rebecca Bryant** (ORCID); **Chris Shillum** (Elsevier); **Greg Tananbaum** (ScholarNext Consulting)

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

In **Tanenbaum's** words, connecting research to researchers is the aim of various groups working on standards. **NISO's** OA Metadata Indicators Project has been underway since 2012, with a delivery date goal soon after the conference. Many OA models, differing audiences, and impacted parties necessitated the creation of a widespread working group. Challenges include embargos, sub-elements of articles, and re-use issues (portability). **Shillum** described FundRef, a non-profit membership association of publishers and non-publisher affiliates. Its aim is to provide standards for conveying funding sources. Standardized metadata is not available — funding bodies are often listed in acknowledgement free text, and financial disclosures are in footnotes. Twenty-four publications are now involved (eight are submitting metadata). **Bryant** re-capped the name ambiguity problems that led to the formation of ORCID. As a registry for researchers, it launched

in 2012 (and was presented in last year's conference). It serves as a hub, there are tools to harvest metadata, and there are links to / interoperability with ISNI (which was presented at a different 2013 conference session). Uses include APIs, repositories, professional societies, research information databases, and publisher's manuscript submission workflows. Future plans include incorporating current and past affiliations and adding more: languages, ambassadors, and building membership and adoption (increasing threefold by 2014).

From Spreadsheets to SUSHI: Five Years of Assessing Use of E-Resources — Presented by **Kristen Calvert** (Western Carolina University); **Leslie Farison** (Appalachian State University)

Reported by: **Kristina M. Edwards** (Bridgewater State University) <Kristina.edwards@bridgew.edu>

This presentation covered one of the most cumbersome aspects of our jobs as librarians: collecting statistics. **Farison** talked about the evolution of how librarians have been collecting data including the evolution of COUNTER statistics (COUNTER 4 was released just after the conference) and the current move by some vendors to a new data collection standard called SUSHI. While SUSHI provides some improvement for collecting statistics, the largest issue seems to be the slow or limited number of vendors providing statistics using SUSHI. **Farison** and **Calvert** together presented us a view of their moves from initially just gathering this data in a spreadsheet or use of an access database to the use of **EBSCO's** new consolidation data usage product at both their institutions. There was discussion of the extensive time needed to set up the product and to make decisions about what statistics an **EBSCO** representative would put together, what the system would automatically go out to retrieve electronically and narrowing down

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what resources the librarians would still have to continue to have to collect themselves.

Rebranding the Library: Generating Visibility in the Virtual Age — Presented by **Jeremy Frumkin** (University of Arizona); **Rachel Kessler** (Ex Libris)

Reported by: **Debra Hargett** (Wingate University) <dhargett@wingate.edu>

Academic libraries are increasingly challenged to provide proof of a return on the investment made. Yet how can value be demonstrated if stakeholders aren't aware of the library's role in the delivery? **Frumkin** opened by referencing activities in a study conducted three years ago on provisioning (delivery) to increase awareness for the Library's value in an electronic age. This session further explored demonstrating value through marketing our part in the information chain by unobtrusively branding library resources during the delivery process. Libraries have grown accustomed to signifying value in print with our "brought to you by" cover sheets that may accompany filled ILL request items. However, in the virtual age, how do we replicate that same type of promotion during the delivery process? **Frumkin** and **Kessler** suggest the approach is to leverage the proxy server for resource branding. **Kessler** spoke on a library branding service with the ability to do this. Libraries need to be active in promoting their value to overarching institutions. Delivery is the key value point. Libraries can brand their resources with a transfer screen during the authentication process to inform users the library played a role in providing the resource. Marketing not only the resource, but the value-added service role of "library as broker," is becoming critical for library services to remain visible. They concluded the lack of visibility to stakeholders can negatively impact library budgets as a result.

The Fly in the Ointment? Does Open Access = Savings? — Presented by **Kim Armstrong** (Center for Library Initiatives, CIC); **Jay Starratt** (Washington State University)

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

Armstrong and **Starratt** presented the results of a survey on the impact of open access on libraries and library budgets to a group of approximately one hundred attendees. The survey was sent to about fifty-two libraries from the **Committee on Institutional Cooperation (CIC)** and the **Orbis Cascade Alliance**. There were 23 respondents, which is a 44% response rate, and those who replied represented a variety of libraries from small community college libraries to large research institutions. The results from the survey have led the researchers to conclude that overall it appears that scientists are currently happy for the library to continue to pay for subscriptions and open access. It appears that libraries are currently supporting the idea of open access more than actually supporting the solution. The presenters indicated that currently it is evident that there are more questions related to open access, future directions and potential savings than there are answers.

The Quest for the Holy Grail: Too Many ERM Systems Are Not Enough! — Presented by **Margo Duncan** (The University of Texas at Tyler); **Stephanie Hess** (Binghamton University (SUNY)); **Tiffany LeMaistre** (The University of Texas at Tyler); **Caryl Ward** (Binghamton University (SUNY))

Reported by: **Melissa Hill** (Ohio Wesleyan University) <mkhill@owu.edu>

Binghamton University Library (represented on the panel by **Ward** and **Hess**) indicated that they evaluated their ERM needs, and requested input from all users, including subject librarians. They decided that the ERM needed to be able to track budget activity, to export its data into the ILS (Aleph), and export administrative data, contacts, user credentials, and usage statistics. **Hess** showed screen shots of ERM Essentials and 360 Resource Manager with 360 Counter, focusing on usage statistics. The statistics module, which costs extra, automatically brings usage data into the ERM. **Serials Solutions** provides very sophisticated reporting and allows users to easily create visual aids.

UT Tyler library staff tried to put all of their electronic resource information into an Access database, but decided that they needed an ERM. They selected CORAL, not only for cost reasons, but also because they preferred implementing an open source system. At first, they only handled renewals in the ERM. CORAL has an active user community, which agreed to have new usage reporting features developed. **LeMaistre** and **Duncan** gave a demonstration of CORAL's statistics gathering and reporting, which is still in beta mode. They are hoping for better integration with other systems and more enhancements to the reporting functionality.

You have a DDA eBook Plan, Now How Do you Manage It?: Streamlining Individual and Consortial DDA Program Management using the WorldCat Knowledge Base and EBL – eBook Library Profiling — Presented by **Anne Elguindi** (VIVA); **Sara Finch** (OCLC); **John Holm** (Norwich University); **Sadie Williams** (ProQuest)

Reported by: **Melissa Goertzen** (Columbia University Libraries) <mjg2227@columbia.edu>

As Demand-Driven Acquisitions (DDA) eBook programs are adopted by institutions and consortia, librarians and vendors are examining challenges related to loading records and ensuring discoverability. This session examined two case studies — **Kreitzberg Library** at **Norwich University** and the **Virtual Library of Virginia** — to discuss the management of local and consortial DDA programs using WorldCat Knowledge Base (WCKB) and the **EBL** profiling system.

Williams and **Finch** provided a description of how WCKB and **EBL** work in tandem to "automate portions of the record management and collection development workflows." The overarching goal is to provide customization options so that institutions or consortia can design workflows that suit unique collection needs.

At the local level, **Holm** established a DDA program at **Norwich University** for a user community that requires remote access to collection materials. Workflows offered by WCKB and **EBL** provided unlimited simultaneous access, downloading for offline use, and an intuitive patron-facing interface. He also implemented strategies like increasing the auto-purchase trigger from the third to fourth short-term loan to account for annual price increases.

Elguindi discussed her experience applying DDA workflows to VIVA, a consortium composed of 73 libraries. One of the large benefits is that each library receives a weekly load of MARC records from **EBL** to **OCLC**. From there, libraries can edit records according to their needs. However, **Elguindi** found that on a consortial level, agreeing on standardized definitions of terms like "updates," "deletes," and "new" can create record management challenges.

At the end of the session, **Williams** mentioned that **EBL** was recently acquired by **ProQuest**. It will be interesting to observe how DDA services evolve and develop under new leadership.

THURSDAY, NOVEMBER 7, 2013 AFTERNOON PLENARY SESSIONS

Too Much Is Not Enough in 6 minutes and 40 seconds — Presented by **John Dove** (Credo Reference)

Reported by: **Calida Barboza** (Ithaca College) <cbarboza@ithaca.edu>

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In this PechaKucha, **Dove** shared what he learned from attending a variety of academic conferences focused on teaching and learning. At the SHARP conference, he heard about *The Literature of the Book*, which he described as a metabook that includes an annotated bibliography of the core readings for book professions. Reading these classics, **Dove** said, will help those professionals look out for trends and game changers. He also spoke about **Sir Ken Robinson's** TED talk on how the educational system is bad at helping people find careers they are good at and enjoy. Referencing the work of **Diane Pike** (**Augsburg College**) and the presentation after his on MOOCs, **Dove** asked attendees to consider how well MOOCs deliver on teaching students the knowledge, skills, and attitudes necessary for lifelong learning. He asserted that of the three areas, attitude is the most important because if the love of learning can be instilled in students, they will be more likely to adapt to changes. In closing, **Dove** taught the audience a skill that would affect their attitude: a power pose he learned from **Amy Cutty's** (**Harvard Business School**) TED talk.

If the University is in the Computer, Where Does That Leave the Library? MOOCs Discovered — Presented by **Meg White**, Moderator (Rittenhouse Book Distributors, Inc.); **Rick Anderson** (University of Utah Libraries); **Meredith Schwartz** (Library Journal); **Lynn Sutton** (Wake Forrest University)

Reported by: **Melissa Goertzen** (Columbia University Libraries) <mjg2227@columbia.edu>

Massive open online courses (MOOCs) bring high-quality education for low cost to a global community. With a heavy emphasis on open access resources and interactive online learning communities, many question whether libraries have a role in these environments.

The four panelists in this session discussed how MOOCs provide opportunities to experiment with innovative services. For instance, **Schwartz** said that libraries work as "material matchmakers" who negotiate permissions and locate authoritative open access resources. Building off this point, **Sutton** said that she offers research and production services to faculty at **Wake Forrest University** who develop MOOCs in a variety of fields.

The general consensus among panelists was that online learning is here to stay. As mobile technologies continue to develop and spread across the globe, there is likely to be an exponential increase in the accessibility of MOOCs over the coming years. To prepare for the changes this will bring to higher education, **Anderson** encouraged librarians to enroll in a MOOC and become acquainted with the technology. In addition, all libraries should review, evaluate, and update open access mandates in anticipation of future client and service needs.

THURSDAY, NOVEMBER 7, 2013
POSTER SESSIONS

Acquisition Budget Allocation at CSU Library Using Algorithm: How Do You Do It at Your Library? — Presented by **Azungwe Kwembe** (Chicago State University)

A Collection Explosion: Evaluating a Collection 145 Years in the Making — Presented by **Jennifer Maddox Abbott** (University of Illinois at Urbana-Champaign); **Mary Laskowski** (University of Illinois at Urbana-Champaign); **Michael Norman** (University of Illinois at Urbana-Champaign)

Beyond COUNTER: Using IP Data to Evaluate Our Users — Presented by **Timothy Morton** (University of Virginia)

Beyond ROI: Challenges and Opportunities in Overseas Buying Trips — Presented by **Mara Thacker** (University of Illinois Urbana-Champaign)

Cheap and (relatively) Easy PDA: A Conservative and Successful Pilot Project — Presented by **Amelia Brunskill** (DePaul University); **Nicole Casner** (DePaul University)

Comparison of Publishers with Mobile Accessibility for Ebooks — Presented by Jean Gudenas (Loyola University Health Sciences Library)

Creating a Richer Patron Driven Acquisitions Experience for Your Users: How the University of Arizona Forced 3 PDA Programs to Play Nicely Together — Presented by **Teresa Hazen** (The University of Arizona)

Determining Allied Health Core Titles — Presented by **Robert Britton** (University of South Alabama)

ILL's Return on Investment: Why ILL is Still a Great Collection Tool — Presented by **Gerrit van Dyk** (Brigham Young Univ.)

Mobilizing the Virtual Library: A Next Generation Concept for Discovery and Content Consumption — Presented by **Robert Zylstra** (MacEwan University)

Not Just a Bookkeeper: Planning & Describing Your Work with Promotions (and Tenure) in Mind — Presented by **Lizzy Walker** (Wichita State University); **Ginger Williams** (Wichita State University)

Rediscovering the Lost World of Print Serials — Presented by **Melody Dale** (Mississippi State University); **Derek Marshall** (Mississippi State University)

Roving Exhibits — Presented by **Arlene Salazar** (Texas State University, San Marcos)

Stacks Reorganization at a Small Liberal Arts School — Presented by **Katherine Hoffman** (University of Richmond); **Carrie Ludovico** (University of Richmond); **Travis Smith** (University of Richmond) — Additional Contributors: **Tom Campagnoli** (University of Richmond); **Lynda Kachurek** (University of Richmond); **Catherine Clements** (University of Richmond)

Study Psychology Researchers' Citing Behavior For Collection Development — Presented by **Jacqueline Bronicki** (University of Houston); **Irene Ke** (University of Houston)

Virtual Verse in the Library: Surveying the e-Poetry Landscape — Presented by **Rachel Fleming-May**, (University of Tennessee)

Reported by: **Karen Shaines** (Joint Library Research Group, International Monetary Fund) <kshaines@imf.org>

There were sixteen poster sessions covering a wide range of topics, including mobilization of the library, PDA, budget allocation, eBook platforms, evaluation and weeding of print collections, and specialized subject collections. Here are some selected highlights.

In the area of technological innovation, **Zylstra** presented the **MacEwan University Libraries** (Canada) project on "Mobilizing the Virtual Library." Developers at the university created an iPhone app using the **EBSCO** Discovery Service API (Application Programming Interface) to provide users with the most important library resources.

Two posters showed PDA programs with several eBook platforms running simultaneously and with both print and eBook formats. **DePaul University** (**Brunskill**, **Casner**) demonstrated how a PDA pilot could be cheap and relatively easy, using **YBP** and two platforms, **ebrary** and **EBL**. The **University of Arizona** (**Hazen**) had PDA programs with **EBSCO** through **Ingram**, and **EBL** through **YBP**. The **EBSCO** PDA was both print and electronic.

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Gudenas compared mobile accessibility of five eBook platforms: **ebrary**, **EBSCO**, **Elsevier**, **Inkling**, **McGraw-Hill**, and **STAT!Ref**. Criteria were scope of the collection, lending and purchasing options, single- or multi-user, downloading for offline use, apps or browsers, and copyright restrictions.

The **University of Richmond** needed to reorganize and renovate the library's physical space (**Hoffman, Ludovico, Smith**). Over seven years, the collection was shifted to electronic with heavy weeding of periodicals, print newspapers, reference, and government documents.

How does a university library allocate a limited budget among many academic disciplines? **Chicago State University** (**Kwembe)** used a system of formulas and variables for equitable distribution. Otherwise, funds would be divided on a first come, first serve basis, with shortfalls at the end.

In-depth studies of subject collections included the electronic landscape of poetry (**Fleming-May**); assessing the psychology collection based on faculty research and citing (**Bronicki, Ke**); and metrics for determining core allied health journals (**Britton**).

FRIDAY, NOVEMBER 8, 2013
MORNING PLENARY SESSIONS

Collections Are For Collisions: Let's Design It into the Experience — Presented by **Steven J. Bell** (Temple University)

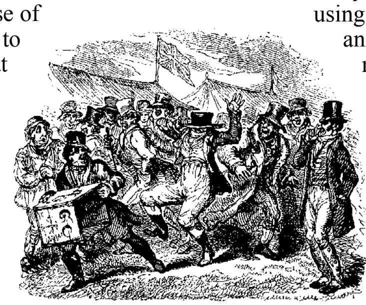
Reported by: **Calida Barboza** (Ithaca College) <cbarboza@ithaca.edu>

Bell's presentation focused on designing serendipity into libraries at a time when a variety of behaviors, such as academic librarians buying fewer books overall, and technological changes are resulting in unintentionally designing serendipitous discovery out of libraries. In addition to discussing the challenges librarians face while addressing this issue, **Bell** offered suggestions such as putting curated stacks or visual bibliographies created by students in the computer space and creating a blind-date-with-a-book display. He also recommended using the **Digital Public Library** as a solution for discovering books at remote locations because the search results bookshelf view shows relevance-ranked book spines. **Bell** suggested that in the future holographic display might allow for virtual imitation of browsing the shelves.

What Provosts Want Librarians to Know — Presented by **James J. O'Donnell**, Moderator (Georgetown University); **Beth Paul** (Stetson University); **Jeanine Stewart** (McDaniel College); **John Vaughn** (Association of American Universities)

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

Provost **Paul** thinks librarians are naturals to provide leadership in higher education since libraries are reflective of what society needs — libraries are interdisciplinary, swimming rather than drowning in information, and nimble and adaptable. Critical roles of library leaders include: neutral change agents, innovators in technology integration, front-line informants about students as learners, and hosts providing a sense of place and community. She sees libraries as essential to university renewal. Provost **Stewart** pointed out that provosts come from teaching faculty ranks and have no idea about the inner workings of libraries. Libraries are more complex than ever, and librarians must tutor provosts on library trends. Provosts consider the library to be a program, not a building, and they are interested in programs that involve risk in exchange for return on investment and enhancement of revenue and reputation. **Vaughn**, Executive Vice President of the **Association of American Universities**, spoke about the **AAU** Scholarly Publishing Roundtable's work to expand public access to journal articles resulting from federally-funded research. Provosts and libraries and can work together to promote scholarly communication by subsidizing faculty members' first books, by covering article processing charges, and by implementing institutional repositories. **Vaughn** reported that provosts seek innovation, advice and counsel, and public presence from libraries, and libraries want provosts to listen, to value students as well as faculty, and to support innovation.



FRIDAY, NOVEMBER 8, 2013
CHARLESTON NEAPOLITAN SESSIONS

Content, Services and Space: The Future of the Library As Lines Blur — Presented by **David Parker**, Moderator (Alexander Street Press); **Rick Anderson** (University of Utah Libraries); **Nancy Gibbs** (Duke University Libraries); **Stephen Rhind-Tutt** (Alexander Street Press); **Heather Staines** (SIPX , formerly Stanford Intellectual Property Exchange)

Reported by: **Kristina M. Edwards** (Bridgewater State University) <Kristina.edwards@bridgew.edu>

This plenary session brought together professionals representing libraries, vendors, and publishers. Each panelist touched upon a different issue that illustrated how the lines have blurred and will likely continue to blur. One of the topics that was discussed was the idea of libraries as publishers. As libraries continue to build institutional repositories and host new journal content, libraries are becoming "publishers" and providing new content traditionally just provided by publishers. There has also been a new trend of universities consolidating their university presses with their libraries. There was also discussion of librarians' new roles in creating and building new technologies. Librarians are now also programmers, software engineers, Web designers, as well as hosts of various types of content including streaming video. Another area of blurriness has been occurring within the acquisitions involving new types of unique content requested by faculty and library patrons (ex. providing access to a TED Book on a single device for a class of students), which requires a full knowledge of licensing and various technologies needed to supply access. Librarians are also providing services and access to resources through course management systems and for MOOCs as universities offer more online classes. There was also mention about how librarians can use these instances of blurriness as an opportunity to reaffirm the value of libraries and our abilities to create good metadata to enhance access and discovery for our patrons.

Don't Be an Invisible Library! — Presented by **Rick Burke** (SCELC); **Matt Goldner** (OCLC); **Glenn Johnson-Grau** (Loyola Marymount University); **Franny Lee** (SIPX, Inc.)

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

Burke moderated the session with an example of branding and engagement of libraries, as well as **OCLC's** engagement of libraries at the community level, then he introduced the speakers. **Johnson-Grau** talked about shedding the cloak in a new (in 2009) library. Using phrases such as "howdy partner" (including relationships and collaborations using exhibits as launch pads), "presto chango" (Pub Nights and selfie tours to "forbidden" places in library and social media), and others, he argued to be: strategic, a partner, persistent, and at the table. **Lee** provided an overview of **SIPX**, which started as a research project at **Stanford**, as a computer science and law prototype. A Web service for managing and measuring digital course material, the now commercial entity sees itself as an end-to-end solution. Using cloud-based technology, it networks stakeholders and critical data, such as that needed for a MOOC, for example.

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Open Access, Public Access: Policies, Implementation, Developments, and the Future of US Published Research — Presented by **Alicia Wise**, Moderator (Elsevier); **Amy Friedlander** (National Science Foundation); **Howard Ratner** (CHORUS); **Judy Ruttenberg** (Association of Research Libraries); **John Wilbanks** (Sage Bionetworks)

Reported by: **Calida Barboza** (Ithaca College) <cbarboza@ithaca.edu>

After some introductory comments from moderator **Wise,** the first speaker, **Friedlander**, announced that the **NSF** submitted its draft plan for increasing access to federally-funded research. The plan will be made public after it is accepted by the Office of Science and Technology Policy and the Office of Management and Budget. **Ratner** offered that the Clearinghouse for the Open Research of the United States (CHORUS), a not-for-profit, public-private partnership providing public access to the results of federally-funded research, is in the pilot and fundraising phase. **Ruttenberg** provided an overview of the work done to this point by the SHared Access Research Ecosystem (SHARE), which "envisions that universities will collaborate with the federal government and others to host cross-institutional digital repositories of public access research publications that meet federal requirements for public availability and preservation." She said that the working groups will now begin their work. **Wilbanks** presented the process and results of the Sage Bionetworks and DREAM (Dialogue on Reverse Engineering Assessment and Methods) project, a challenge-based, collaborative method of publishing and doing science in which researchers share data more easily than through conventional methods in order to work on a scientific question.

FRIDAY, NOVEMBER 8, 2013
MORNING CONCURRENT SESSIONS

"To Mediate, or Not Mediate, That is the Question:" Setting up Get It Now at Furman University Libraries — Presented by **Tim Bowen** (Copyright Clearance Center); **Janet Nazar** (Furman University)

Reported by: **Emily Whitmire** (SLIS student, University of South Carolina) <whitmier@email.sc.edu>

The **Copyright Clearance Center (CCC)** offers Get it Now (GiN) to provide "just-in-time" fulfillment of journal articles to users whose library does not subscribe to that journal. **Bowen** explained that GiN functions as a complement to traditional ILL, relieving librarians of an increasingly burdensome process of requesting ILLs for students and faculty.

Nazar (Coordinator of Content Management, **JB Duke Library**, **Furman University**) described how **Furman** has implemented GiN. Part of the library's goal was to set up a pay-per-view system for journal article access that would eliminate the role of the ILL department as mediator. Articles from journals that the library does not subscribe to are delivered within minutes to the user's email inbox through GiN. This has reduced significantly the time and financial costs to the library. Without any librarian instruction or marketing, students and faculty at **Furman** downloaded 389 articles from July to October 2013 through GiN.

Bowen (Director of Academic Products and Services, **Copyright Clearance Center**) emphasized that GiN can be tailored to work with library budgets through restrictions on article downloads per account or number of databases searched. A librarian can approve every download, or the system can be fully automated with no involvement from the ILL department. Libraries can decide whether to allow access to articles via mediated, unmediated, or hybrid models of GiN. **Nazar** is pleased with the implementation of GiN at **Furman** and will continue to track statistics for cost analysis.

Alma in the Cloud: Implementation through the Eyes of Acquisitions — Presented by **Denise Branch** (Virginia Commonwealth University)

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

Branch started with some "cloud facts," moving on to the efficiencies and the whys of moving the library operation to the cloud. She described Alma, and how the timing was right for **VCU's** library to move onboard as an early adopter: financial incentives, a good fit for PRIMO, and the promise of quality performance measures the existing ILS could not offer. Inefficiencies to resolve included convoluted and inflexible workflows, disparate systems, duplication, communication silos, difficulty in tracking licenses, and too many paper routing forms. The journey was methodical, with an implementation task force and a blog and workshops for staff, also including a workflow analysis (with the plan to eliminate, consolidate, and streamline). There were technical analysis meetings, data checking, Web calls with the vendor (**Ex Libris**), problem priorities worksheets, a freeze of operations, and a final freeze before the switch. The move was by module and there was lots of testing.

Best Practices for Demand-Driven Acquisition of Monographs: Preliminary Recommendations of the NISO Working Group — Presented by **Barbara Kawecki** (YBP); **Michael Levine-Clark** (University of Denver Libraries)

Reported by: **Gwen Vredevoogd** (Marymount University) <gvredevo@marymount.edu>

The **NISO** DDA Working Group was charged with developing best practices for DDA that works for publishers, vendors, aggregators, and libraries alike. Speakers **Kawecki** and **Levine-Clark** explained the survey results clearly and briefed us on the preliminary recommendations.

The survey was conducted in August, 2013. The majority of the 181 respondents indicated that their DDA program was effective and met their institutional goals. 70% of the respondents had eBook-only DDA, while many indicated an interest in adding print. The speakers also shared primary benefits and challenges given by the survey respondents.

The preliminary recommendations of the working group emphasized flexibility. The group recommended that access models include controls for intentional use and options for different levels of comfort with access vs. ownership, such as adjustable short-term loan levels or optional purchase. Regarding technical issues, the recommendations include implementation of a profile that can be managed relative to budget, including records management. They also noted the importance of having high-quality records. Recommendations for metrics included the ability to measure all types of use and the ability to use the data to predict spending patterns, adjust the profile, and adjust triggers.

The final report will be available in May, 2014.

Collection Development Policies for the 21st-Century Academic Library: Creating a New Model — Presented by **Steve Alleman** (University of Missouri-Kansas City); **Daniel Mack** (University of Maryland)

Reported by: **Julia Hess** (University of San Diego) <jihess@sandiego.edu>

This presentation would have made an excellent lively lunch session. The speakers opened by suggesting that the traditional guidelines for creating a collection development policy should be updated for the current library setting. They proposed several areas that should be considered when putting together a modern collection development policy, such as new content areas (e.g., international issues and digital humanities), new modes of delivery (e.g., DDA and open access publishing), and

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And They Were There
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technological issues (e.g., data curation and embargoes). After this brief presentation, they opened the floor for comments and questions from the packed room, leading to an excellent discussion. Attendees seemed to agree with the presenters' premise and mentioned a number of additional issues that are part of creating a collection development policy in today's environment, such as the importance of building in some level of flexibility, determining the audience for the document and whether part or all of it should be publicly accessible, and even whether or not it is possible to write guidelines broadly enough to apply to all libraries.

Discovery of eBooks and Media - What Will It Take? — Presented by **Suzanne Kemperman**, Moderator (OCLC); **Judy Luther** (Informed Strategies, moderator); **Robert Boissy** (Springer); **John Lenahan** (JSTOR); **Carlen Ruschoff** (University of Maryland); **Aaron Wood** (Alexander Street Press)

Reported by: **Christine Fischer** (UNC Greensboro, University Libraries) <cmfische@uncg.edu>

For this well-attended session, the audience filled all seats and much of the floor space. **Lenahan** noted that **JSTOR** has long-term experience with electronic journals but only recently has offered eBooks, so they are working closely with linking partners to be sure access points are available where users will see them. **Boissy** pointed out that syncing saleable packages and content with knowledge bases is an issue, as control becomes complex with so many available packages. A package identifier could help with discovery, a concern as much for publishers as libraries. Media presents additional issues, according to **Wood**, who talked about the value of standard identifiers for media as a means of discovery in an ISBN/ISSN world. Ensuring that resources are available and accessible to students and faculty requires that libraries look at where access might fail, according to **Carlen**, who pointed out the need to engage with publishers, vendors, and knowledge base providers to improve metadata. A small working group has been developing a discussion draft for a white paper on best practices. Much of the lively discussion centered on accurate and timely metadata as crucial to the user experience and a factor in library selection decisions.

Questions about Academic Librarians –Presented by **Shin Freedman** (Framingham State University)

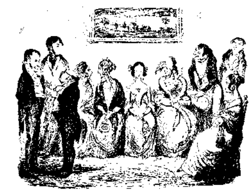
Reported by: **Catherine Martin** (SLIS student, University of South Carolina) <marti622@email.sc.edu>

Freedman, an academic librarian at **Framingham State University** in Massachusetts, recently took a sabbatical (one of the perks of her tenured status) in order to study the identity, affiliations and roles of librarians who work for academic libraries. Because she has long struggled with her own identity as a non-faculty professional at a university, she designed a study to ask other academic librarians about how they see themselves and how they are recognized by their universities. She found that while academic librarians (her studied focused on those working in the northeastern U.S.) do still typically identify with traditional librarian roles (providing reference services and subject studies), they are also adding more emerging roles to their jobs, such as educator and information professional. In addition, she noted that her own confusion about how she fits into the larger picture at universities is shared by many. Her results also indicate that many academic librarians have neither tenure possibilities nor faculty status (professor or other related job titles).

Saying Goodbye to the "Electronic Resources" Fund: Restructuring the Library Budget for the Age of e-Resources — Presented by **Maria Savova** (Claremont Colleges Library)

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

In this standing room only session, **Savova**, of **Claremont Colleges Library**, discussed her library's successful quest to re-organize its collection development budget. She described how the traditional division of acquisitions funds into print and non-print components no longer met the planning and purchasing needs of the institution and suggested that a much more useful division of ongoing versus firm commitment is more appropriate in a modern library. Through many examples and concrete details, **Savova** explained and emphasized that planning and controlling expenditures in a transparent and consistent manner are essential, and they require continual examination as well as modification of materials budgets and structures. The speaker pointed out that in her library the funds are discipline-based, as opposed to subject-based, and that the division of funds into print and non-print funds might be more difficult in a library where subject funds are used. From the amount of discussion and number of questions from the audience, it was evident that this topic generated a great deal of interest amongst attendees.



Using the Past to Chart the Future: Evaluating Top Circulating Print Books by Subject and Publisher to Inform Future eBook Purchases — Presented by **Anne Elguindi** (VIVA); **Michael Matos** (American University)

Reported by: **Derek Marshall** (Coordinator of the Veterinary Medicine Library, Mississippi State University) <dmarshall@library.msstate.edu>

In the first half of this presentation, **Elguindi** described the collection analysis process of the **Virtual Library of Virginia**. The pilot program of seven institutions reported circulation and ISBN data of print titles to the central **VIVA** office. This data was used to determine the subject area of the most heavily-used titles and which publishers offered these titles. **VIVA** could then base their decision to purchase aggregated eBook packages from leading publishers in certain subject areas on sound statistical data.

Matos continued the presentation by describing the collection analysis process at **American University**. **Matos** compared data from existing print approval plans with information in the library's knowledge base or ERM. The information gathered from publishers with online content consisted of perpetual access statements, open URL linking, MARC records, stability of platform, and any previous issues with the vendor or publisher. This data was used to determine which publishers to use for eBook purchasing in the future. However, **Matos** admits some challenges in purchasing aggregated packages: while there might be a lower cost by title, the overall cost for the package was greater; there is an uncertainty of any given publisher's commitment to the current model; and consortium access may vary.

That's all the reports we have room for in this issue. Watch for more reports from the ***2013 Charleston Conference*** *in upcoming issues of* ***Against the Grain****. Presentation material (PowerPoint slides, handouts) and taped session links from many of the 2013 sessions are available online. Visit the* ***Conference Website*** *at* ***www.katina.info/conference****. —* ***KS***