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ATG Interviews: Peter Shepherd, Retiring Director, COUNTER Online Metric

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ATG Interviews Peter Shepherd

Retiring Director of COUNTER Online Metrics

by **Tom Gilson** (Associate Editor, *Against the Grain*) <gilson@cofc.edu>

and **Katina Strauch** (Editor, *Against the Grain*) <kstrauch@comcast.net>

ATG: Peter, we understand congratulations are in order. We recently learned that you are retiring as Director of COUNTER after serving since its inception. Looking back on it what would you like people to say about your legacy? What do you view as your key achievements?

PS: COUNTER is and has always been very much a team effort; indeed, the *esprit de corps* we have built up that has enabled librarians and vendors, who have not always seen eye to eye, to work constructively for more than a decade has been one of our main achievements. My own contribution to that has I think been to keep the show on the road!

ATG: How did your experience working at publishers like Wiley, Pergamon, Elsevier, and Harcourt prepare you to guide COUNTER?

PS: Every publisher has its own company culture, and working in these diverse publisher environments gives one some insight into achieving objectives in different ways. For example, the image of **Robert Maxwell's Pergamon** was that of a totalitarian



regime. Yet, as individual publishers we were more free to pursue new projects than in any other organization I have worked for. There was none of the micromanagement prevalent in other organizations; it was like working in an earthquake zone, 99% of the time one was left to get on with it, with the occasional tremor, of unpredictable magnitude, to enliven things.

ATG: What were the most serious challenges you faced during your tenure? And how did you deal with them?

PS: Our greatest challenges were at the outset of the project, back in 2002, when publishers and librarians were coming at usage statistics from very different perspectives. There was not even broad agreement within these two constituencies about what they wanted. Some enlightened publishers, those who were the very first to support COUNTER, understood the potential benefits to their industry of providing usage statistics to an agreed standard; others saw it as an unnecessary extra cost. On the library side there was also a tension between those librarians who wanted a set of practical, implementable usage reports, while others wanted a whole range of very detailed usage data that publishers were never going to provide. There were fundamentalists on both sides, but the Sensible Party won through, and there is now very wide acceptance of the COUNTER standards.

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ATG: *On the other side of the ledger, what major opportunities presented themselves? How did you take advantage of them?*

PS: There have been two great opportunities during my tenure at COUNTER. The first was to show that we could set standards that were both rigorous and implementable by any publisher/vendor that has a platform with online publications; in other words a standard for the Many, not the Few. The second opportunity is to build on the fact that there are now COUNTER-compliant usage statistics for over 20,000 full-text online journals, as well as databases and hundreds of thousands of books. This gives us the opportunity to develop a range of usage-based metrics that can give new insights into the impact and value of scholarly publications.

ATG: *COUNTER develops Codes of Practice to set standards for vendor reporting of online usage of journals, databases, books, etc. How does that process work? Whose input is sought? How are decisions made?*

PS: The COUNTER Code of Practice is now in Release 4 and each Release has been developed with the active input of librarians, publishers, and others. As soon as a new Release is published we commence preparation for the next Release by maintaining an Upgrade Log, which records suggested modifications from any source. These are reviewed by the COUNTER Executive Committee and prioritized for the next Release. In addition we conduct surveys and focus groups to gain insights into the changes the community would like to see. When we draft a new Release, the Executive Committee discusses and reviews prior to publication of the draft for public comment. Further modifications are then made and a definitive new Release published, with a deadline being set for its implementation by vendors.

ATG: *We understand that COUNTER has broadened its scope to cover new usage-based metrics, notably the Usage Factor for journals and article-level usage reporting. How is COUNTER planning to fulfill these responsibilities? What new usage-based metrics will be covered? Can we expect to see relevant Codes of Practice in the near future?*

PS: This year we have published two new Codes of Practice. First, the COUNTER Code of Practice for Articles (<http://www.projectcounter.org/counterarticles.html>), which sets a standard for the recording and reporting of usage at the individual article level. A very important aspect of this Code is that it can be implemented by repositories as well as by publishers and aggregators. This is important as repositories represent a significant and growing proportion of online usage. We have also published a new Code of Practice for Usage Factors, which will enable publishers to calculate Usage Factors for their journals based on COUNTER data. Release 1 of the COUNTER Code of Practice for Usage

against the grain people profile

P. Shepherd

BORN & LIVED: Edinburgh, UK.

EARLY LIFE: I grew up in the Scottish countryside.

FAMILY: No children.

PROFESSIONAL CAREER AND ACTIVITIES: Publisher, 1980-2002; Director, COUNTER 2002-present.

IN MY SPARE TIME I LIKE: Walking, skiing, fishing, music.

FAVORITE BOOKS: Trollope: *The Way We Live Now*. 🌲

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Factors is now published on the COUNTER Website at: http://www.projectcounter.org/usage_factor.html. It is based on well-established COUNTER standards, procedures, and protocols, and its publication follows several years of statistical testing to ensure the validity and resilience of this new metric. This Code of Practice provides publishers with the protocols required to record and report Usage Factors for their online publications in a credible, consistent, and compatible way. While Release 1 focuses on Usage Factors for journals, it is envisaged that its scope will be extended in subsequent Releases to cover other categories of online publications.

ATG: *How does the growing open access movement impact efforts like COUNTER? How are COUNTER usage-based metrics being applied to open access journals?*

PS: COUNTER is indifferent to the access model used, and our standards apply to open access journals and other open access publications. In the most recent Release of the Code of Practice we have introduced a new report, specifically to cover 'hybrid' journals, in which some papers are open access, while others are paid-for access. This report allows usage of open access articles to be reported separately, and allows librarians to assess the usage and value of the paid-for access journals.

ATG: *As a not-for-profit company how is COUNTER funded?*

PS: 80% of COUNTER's funding comes from our members. We have over 200 members consisting of libraries, library consortia, publishers, intermediaries, and industry organizations. This breadth of membership is crucial to our mission, as it ensures that no single interest group dominates. We have set the membership fees at modest levels to ensure the widest possible access. The 2015 librarian membership costs U.S.\$455. A further 10% of our income comes from Sponsors and the remainder from research grants for projects to which COUNTER provides its expertise. This funding model allows us to make the

Codes of Practice freely available and ensures that librarians receive their COUNTER usage reports at no charge from vendors.

ATG: *We would think that as COUNTER takes on new responsibilities, funding would need to be increased. Is there a plan in place to raise more money to meet any increase in operating expenses?*

PS: Yes, we intend to expand the membership, which is currently more than 80% U.S./UK based. Libraries and Library Consortia worldwide benefit from free access to the COUNTER usage reports, and we would like to see more of them in Asia, South America, and elsewhere support COUNTER.

ATG: *It strikes us that balancing the needs of librarians, publishers, and vendors is essential to the success of COUNTER. What strategies would you recommend to your successor to maintain this delicate balance?*

PS: I think when one is working on standards that serve a range of constituencies one should heed Mae West's dictum: if a thing's worth doing it's worth doing slowly. Take time to achieve a broad agreement before moving ahead; the standard will be more robust as a result. COUNTER's strategy hitherto has been twofold. First, to ensure that all three constituencies are well represented at every level of the COUNTER organization — on the Board of Directors, on the Executive Committee, and on the International Advisory Board, as well as in the membership. Second, to engage continually with the communities we serve via conference presentations, Webinars, articles, and social media.

ATG: *After leaving COUNTER will you maintain any role in the information industry? Can we expect an occasional visit to Charleston to attend the Charleston Conference?*

PS: I don't plan to continue with any formal role in the information industry after leaving COUNTER, as I have a few other

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activities I want to get more involved in. You may have heard that we had a little Referendum here in the UK, where the proposal was to break up the country. Fortunately, the secessionists were defeated, but they do not appear to have accepted this democratic result and continue to stir things up. Those of us who believe in the Union must therefore be prepared to devote further energies to ensuring that we stay together. I am sure, however, that I have not paid my last visit to Charleston.

ATG: *What about fun things? What activities do you plan to pursue now that you will have a bit more time to focus on personal interests?*

PS: Well, there are many fine Scotch malts I have yet to try, there are salmon waiting to be caught, and Highland hills to be climbed. Apart from that there are Italian operas to be heard, more French cheeses to be tasted, as well as Trollopes to be read. I understand that being retired is a full-time occupation!

ATG: *Peter, thank you so much for all of the things you have done for the industry over the years, and of course, for taking the time to talk to us about them.*

PS: It has been both a pleasure and privilege to work with such great colleagues in the publishing and library worlds. We are very fortunate in this industry to be able to combine business and pleasure. 🍷

Booklover
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During this time these lightning bugs create a unique synchronous light show. This particular species is the only one in America that can synchronize the light patterns. With the coming of a milestone birthday, three of my very close high school buddies and I have reservations to experience this synchronous light show. We were eager to explore life when we were young, and now we gather to remember that we can still be fascinated by both the simplicity and the complexity of that life. Some of our wonder is reflected in **Tagore's** "Fireflies." I leave you with five:

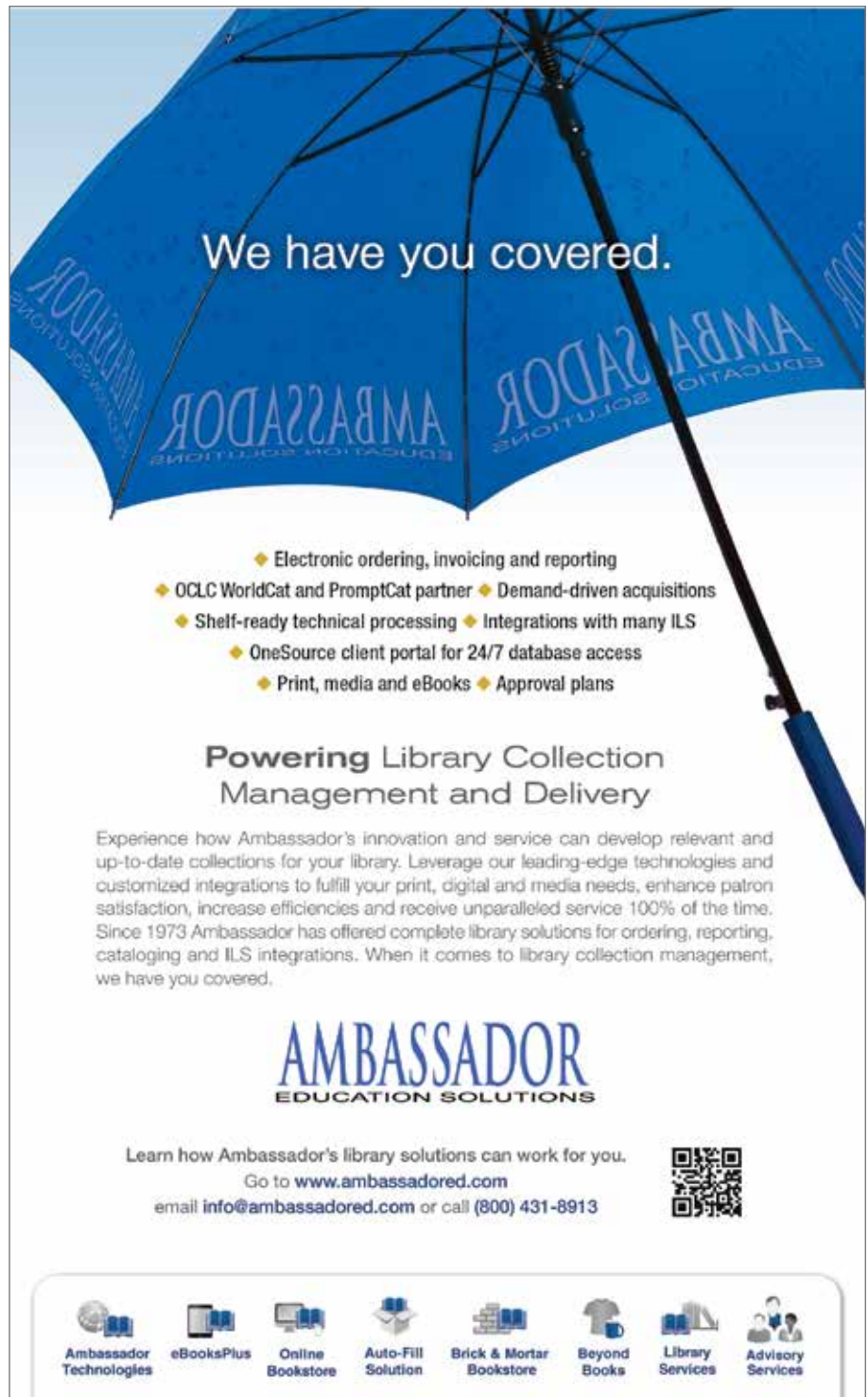
"The fireflies, twinkling among leaves, make the stars wonder."

"In the drowsy dark caves of the mind, dreams build their nest with fragments dropped from day's caravan."

"The sea of danger, doubt and denial around man's little island of certainty challenges him to dare the unknown."

"Day with its glare of curiosity puts the stars to flight."

"The tapestry of life's story is woven with the threads of life's ties, ever joining ever breaking." 🍷



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January 13, 2015, surrounded by family and friends. He was 80. **Jerry Curtis** was a true legend. He attended the **University of Scranton** where is played varsity basketball and was voted MVP for the 1956 season. After serving in the **U.S. Army**, he went on to a distinguished career as a Senior Executive in the publishing industry. He was working at **Springer-Verlag** when I first met him. **Jerry** didn't mince words and was one of the most

astute people I have ever encountered. His wife of 52 years, **Mary Jane**, three children and two grandchildren survive him. Donations may be made to **Dana Farber Cancer Institute**, P.O. Box 849168, Boston, MA 02284, and **Clergy Health and Retirement Trust**, 66 Brooks Drive, Braintree, MA 02184. For info and online condolences, www.richardsongauffeyfuneralhome.com. Obituary published in *The Scituate Mariner* from Jan. 15 to Jan. 22, 2015. <http://www.legacy.com/obituaries/wickedlocal-scituate/obituary.aspx?pid=173858041#sthash.n9R6W8AM.dpuf> 🍷