

2014

Peter Shepherd Profile

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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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