Against the Grain

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And They Were There--Reports of Meetings

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Reports of Meetings — 34th Annual Charleston Conference

Issues in Book and Serial Acquisition, "The Importance of Being Earnest" — 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 5-8, 2014

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 2014 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.charlestonlibraryconference.com**, 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 **2014 Charleston Conference** blogger, **Donald T. Hawkins**. Visit the conference blog at: **http://www.against_the_grain.com/category/chsconfblog/**. The **2014 Charleston Conference Proceedings** will be published in partnership with **Purdue University Press** in 2015 (**http://docs.lib.purdue.edu/charleston/**).*

*In this issue of **ATG** you will find the fifth installment of 2014 conference reports. The first four installments can be found in **ATG v.27#1, February 2015**, **v.27#2, April 2015**, **v.27#3, June 2015**, and **v.27#4, September 2015**. We will continue to publish all of the reports received in upcoming print issues throughout the year. — **RKK***

FRIDAY, NOVEMBER 7, 2014
LIVELY LUNCH DISCUSSIONS

Collecting and Acquiring in Earnest (The 14th Annual Health Sciences Lively Lunch) — Presented by **Andrea Twiss-Brooks**, Moderator (University of Chicago); **Nicole Gallo** (Rittenhouse); **Ramune K. Kubilius** (Northwestern University); **Emma O'Hagan** (Western Michigan University School of Medicine); **Yumin Jiang**, (University of Colorado Health Sciences Library)

*NOTE: **Wendy Bahnsen** served as host and presented in place of **Nicole Gallo**.*

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

Host **Bahnsen** greeted close to fifty attendees, and moderator **Twiss-Brooks** introduced the session. **Kubilius** did the traditional "year in review" synopsis of developments since the last conference. (The handout is posted in the conference site): publisher anniversaries, big data, open access initiatives, new publications.

Bahnsen described the R2 PDA model and shared highlights from a customer survey (May 2013). Of R2 eBook purchases, about 65% were firm purchases and 35% came through the PDA process. Library customers selected from 2 to 4,500 titles for the program but more often, about 400, or 10% are selected from PDA. Overall, 27% of the titles migrated to the shopping cart were purchased. **Jiang** shared insights about three eBook PDA/DDA (patron-driven or demand-driven acquisition) programs: *MyiLibrary (*2012); R2 (2013); **EBSCO** (2014, three months before the conference). The library's goals in trialing: increase access to eBooks, build up subject collections outside core collection areas, and experiment with "just in time" acquisitions. Availability of books in *Doody Core Titles* is an appreciated feature. Desires for PDA: set up a library profile; devise workflows; investigate consortia deals; devise assessment metrics; make weeding decisions. It's not easy to balance three different providers' PDA programs at the same time.

O'Hagan shared experience with journal articles "on demand" and "pay per view" at two institutions. The Get It Now delivery service returns articles in under two hours. Her current institution caps the number of requests per day and encourages "thoughtful use." One problem: multiple individuals needing the same article for a class. She also described other experiments with ReadCube's institutional model and Reprints as a complement.

Twiss-Brooks moderated varied audience queries about: promotion (PDA and article-on-demand), availability of turnaway statistics from providers, requests through mediated services of articles already available in library-licensed journals, usability, browsing, downloading availability, assessment, usage studies, and surveys.

Discovery on Trial! — Presented by **Christopher C. Brown** (University of Denver); **Bob Boissy** (Springer Science+Business Media); **John McCullough**, (OCLC); **Lettie Conrad** (SAGE)

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

Assessment results shared by **Boissy** (Account Development Manager) for referring sources from the **University of Denver** to **SpringerLink**

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Being Earnest with Collections
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involved regular meetings with subject librarians and unit library collections managers, working with them to review the titles that have come on approval and the titles that were excluded based on the parameters of the plans, in order to tweak the plans to make them more efficient at pulling in material we want and excluding material we don't. Titles that have been firm ordered from **Coutts** over the past year have also been reviewed, and additional changes to the plans have been made as a result. Regular contact with the **Coutts** collections consultants has been maintained to ensure that requested changes to the approval plans are implemented and any issues resolved.

While there were many challenges in setting up the new model and many unforeseen glitches had to be worked through, the new model is now working smoothly, and many initial concerns have been allayed. Continued evaluation is needed, as the focus so far has been on ensuring we obtain the titles librarians think we should be receiving. We have not yet assessed use of the titles acquired on PDA or of titles purchased on approval as it was still too early for such analysis, but comparisons are of interest. A major benefit of the new model has been the significant savings, but future assessment will have to be conducted to ensure the savings are not prioritized over the development of a robust research collection.

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demonstrated that the top three access points in order of frequency were direct traffic, Web-scale discovery sources, and Google sources. He described activities used to assess and improve discovery, such as monitoring usage problems to identify downturns and chronic under use. **Brown** (Reference Technology Integration Librarian) commented that a primary impediment to students discovering book resources is the surrogate record, i.e., the catalog record metadata, which has a very small proportion of searchable terms in comparison to the full text of a book. Discovery tools must achieve a reasonable balance between relevance through metadata and discovery via the full text. For **McCullough**, the value of discovery goes beyond simply locating information on a topic to increasing fulfillment and offering users access to collections. Challenges to effective discovery include disparate users and content types. **Conrad** (Online Product Manager) maintained that publishers are increasingly interested in discovery services, and they see a need for their resources to be accessible everywhere. She briefly noted the work of the **NISO** Open Discovery Initiative, with its goal of developing standards and recommended practices for next generation discovery services. Discussion was robust, and a number of attendees tweeted during the session.

Moving On?: Looking at the Role of Liaison Librarians in Building the Electronic Collection — Presented by **Fran Rosen** (Ferris State University Library); **Leah Monger** (Ferris State University Library)

Reported by **Chris Vidas** (Ball State University) <cdvidas@bsu.edu>

Full attendee participation for this session generated an engaging dialog that fulfilled the expectations of the "Friday Lively Lunch" crowd. Co-moderators **Rosen** and **Monger** tapped into their extensive experience with acquisitions to present a series of thought-provoking questions pertaining to collection development for electronic resources and the roles played by library liaisons and faculty in building those collections. The energized participants provided theoretical solutions to the broad questions posed by the presenters, but also asked their own questions that were batted around the room as attendees offered ideas based upon their own unique backgrounds. Topics included budget allocations, demand-driven acquisitions, faculty expectations, the future of print reference, and ways to build stronger library liaison programs. As the session concluded, it became clear that no two libraries are using the same strategy for tackling these highly relevant topics. However, it was encouraging to know that each library was navigating a similar path laden with obstacles, delays, and occasionally conflicting opinions or expectations amongst librarians or faculty. Attendees departed with new ideas and the consolation that their circumstances were not unique.

The Big Squeeze: State of Book Publishing and Academic Libraries — Presented by **Michael Zeoli** (YBP Library Services); **Corey Seeman** (University of Michigan); **Mary Beth Barilla** (Emerald Group Publishing, Inc.)

Reported by: **Oriana Bedolla** (Student, University of South Carolina-Columbia) <bedolla@email.sc.edu>

Taking a different angle from some of the other sessions, the speakers on this panel began with an overview of the ways in which libraries, publishers, and suppliers share common ground and how the three can use that common ground to work toward a solution to the "big squeeze" issues of diminishing space and diminishing budgets. Discussions focused on the idea that, in order to survive budget and space constraints, libraries as well as suppliers and publishers must all re-think traditional conceptions of the roles they play and the business models with which

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they work. **Seeman** used the **Kresge Business Administration Library** as an example of how a library's function and space can be completely re-imagined for future users. **Barilla** followed up with an analysis of the situation from the publishers' perspective and **Zeoli** contributed his views with the vendors' perspective discussing the struggle with business models and the need for increased flexibility. The panel was knowledgeable and offered a wealth of information on the session topic but more questions surfaced than solutions. It was made clear, however, that the best way to move forward and begin answering these questions would be continued collaboration among libraries, publishers, and suppliers.

What You Need to Know About Moving Collections and Acquisitions into An E-Dominant Model — Presented by **Geraldine Foudy** (University of Maryland, College Park); **Lenore England** (University of Maryland University College); **(Lila) Angie Ohler** (University of Maryland, College Park)

Reported by: **Ramona La Roche** (Student, University of South Carolina-Columbia) <rlaroche@email.sc.edu>

The presenters discussed annual e budgets, the tendency to weed and buy fewer print materials since many books are not being after being ordered, limited space, **YBP**, **EBL/Ebrary**, **OCLC**, and **CCC**. Patron requests were also considered as readers may request print copies of an eBook, (though it has never happened).

Challenges consisted of colleague buy-in, staff's comfort level with experimentation, structural change, public relations, and assessment. The distance education representative focused on the university's desire to increase job skills.

E-Resources Initiative (OERs) need to make better transitions from undergraduate to graduate. Their focus is on Competency-Based Education (CBE) and application. Online Learning Resources (OLR) consist of articles, eBooks, and videos with an emphasis on licensing, access, linking, and analysis. **UMC** is concerned with understanding how students use their Learning Management System (LMS), the relationship of ERMs and CBE, and the Extended Mind tool. **UNC** uses the Equella system.

Also mentioned was the **OCLC** Collections Grid that focuses on stewardship and scarcity. In it, **Lorcan Dempsey** and **Eric Childress** pose research questions such as: Where are organizations in the grid? What are the organizational changes going on at your institution? What can you do to set the stage for changes in an e-model organization? What are some examples of reaching out to departments to promote your e-model?

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AFTERNOON CONCURRENT SESSIONS 2

A Fund Allocation Process: Employing a Use Factor — Presented by **Cindy Shirkey** (East Carolina University); **Lisa Barricella** (East Carolina University)

Reported by: **Gail Julian** (Clemson University) <djulian@clemson.edu>

An overview of the various methods that libraries use to allocate monographic funds was followed by discussion of the path taken at **East Carolina University** to create a formula based on cost and use including eBook usage. The audience was polled at intervals to determine allocation methods currently in use at participant institutions making the presentation interactive. Of the formula types discussed, audience participants most often allocated based on historical data but were interested in moving to a new approach. **ECU** had been using a weighted multiple variable formula. For their new formula, Bonn's use factor, % of circulation divided by % of holdings, and average price paid were used as determining factors. The average price was determined by using cost data from their ILS for books, eBooks, and media. Print usage data was also pulled from the ILS for both check-outs and internal uses. eBook usage data was gathered from titles firm ordered from ebrary and from ECU's DDA plan during a specific time frame. For eBooks, user sessions were counted for each title having two or more sessions. The first session was considered to be internal for cataloging purposes and was not counted. This use and cost data were assigned to 39 internal fund codes. The new formula in many cases resulted in large increases or reductions in funding for departments. To ease transition to the new formula, the first year change was limited to plus or minus $2000. Several questions remain for future years. Should interlibrary loans be included? How would additional eBook vendors be incorporated? How to count untriggered use within the DDA plan? While year one provided a good start, additional work has yet to be done.

Covering Down Under: Books from Australia and New Zealand: What North American Librarian Should Know — Presented by **Faye Christenberry** (University of Washington Libraries); **Bob Nardini** (Ingram Library Services); **Jean Ward** (Ingram Content Group)

Reported by: **Ramona La Roche** (Student, University of South Carolina-Columbia) <rlaroche@email.sc.edu>

Christenberry discussed the challenges faced in buying Australian literature over the last 30 years. Challenges include familiarity with Australian publishers that are rarely picked up by Americans. When it does happen, a delay of one month usually occurs. The books are often not available to trade venues, **Amazon**, and book vendors. The majority 52% are paper vs. 8% hard copies, and shipping is expensive.

She referred to books such as *Carpentaria*, London 2008, reprinted 2009 in NY, and now out of print; as well as the Australian premier **Miles Franklin Award** 2014 winner, *All the Birds* by **Evie Wyld**, **Richard Flanagan**, *The Narrow Road to the Deep North*, Sydney, 2013, **Tim Winton**, *Eyrie*, **Corey Taylor**, *My Beautiful Enemy*, Melbourne 2013, and **Alex Wright**, e-only 2013 through Gobi. Suggestions included publishing with **Random** through one of their American affiliates for persons living in Australia but wanting to publish in the USA.

Ward discussed her role as selector/bibliographer. User information shows strong Australian and U.S. interests in education. The USA enjoys images and literature.

Nardini discussed **Aboriginal Studies Press** and eBooks as a solution. Print-on-demand where orders being fulfilled where customer is located has become quite attractive. He also described areas of interest such as Women Studies, Anthropology, EducationPlay in Schools, History such as French Canadian convicts in Australia. New Zealand is quite productive.

No Crystal Ball: Planning for Certain Future Cuts when the Future is Uncertain — Presented by **Beth Bernhardt** (University of North Carolina at Greensboro Libraries); **Karen S. Grigg** (University of North Carolina at Greensboro Libraries); **Paoshan Yue** (University of Nevada, Reno Libraries); **Gail Stanton** (University of Nevada, Reno Libraries)

Reported by: **Debbie Hargett** (Wingate University) <dhargette@wingate.edu>

The session indeed delivered plans for future budget cuts by delivering two similar strategies recently put into place at their libraries for current budget uncertainty. One library took a comprehensive collection review approach, while the other did a more data-driven process. Both included the use of library liaisons to communicate needs and projected budget cuts. Additionally, the **Univ. of Reno Libraries** used SharePoint for centralized sharing of information allowing for a smooth workflow. The **UNCG Li-**

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braries created a Budget Information page (*http://library.uncg.edu/info/budget/)* as a central reference to projected budget reduction information. To maintain goodwill in an uncertain and often touchy subject, the libraries emphasized their efforts to communicate with faculty by encouraging input and participation in identifying critical items to keep. The **University of Nevada Reno Libraries** planned a 3 phase strategy to span the 2014-2015 yearly budget cycle while concentrating on grouped areas. They outlined a strategy that begins in June of 2014 with *a comprehensive review,* followed by a *journal package review*, encompassed by a *review of databases* spanning the entire academic calendar. The approach for the **University of North Carolina Greensboro Libraries** was to create a Collection Management Team representing invested areas. The team could divide and conquer by forming subgroups to analyze data for a quick turn-around. Using a data-driven process adjustments covered the course of about nine months anticipating the upcoming budget changes for 2014-2015. Forecasting for uncertain future cuts both schools have decided to expand and tune the processes presented. They've found them flexible, transparent, and participatory for all vested parties involved when faced with future budget challenges.

Scholarly eBooks in the Humanities and Social Sciences: Longitudinal Assessment of Project Muse/UPCC eBooks at Emory, Harvard, and Yale — Presented by **Christopher Palazzolo** (Emory University); **Celeste Feather** (LYRASIS); **Katherine Leach** (Harvard University); **Sarah Tudesco** (Yale University)

Reported by: **Amy Lewontin** (Northeastern University, Boston, MA) <a.lewontin@neu.edu>

Feather (Senior Licensing Program Account Manager, **LYRASIS**) began her talk by backing up a bit to discuss the issue of **Lyrasis** working with **ARL** libraries to essentially establish what academic libraries need from eBooks. Once an RFP with specifications was created, it was meant to be a set of specifications to say, if you want **ARL's** business, follow these terms. **Project Muse** was the first "out of the door" and other publishers followed suit. **Palazzolo** (Head of Collection Management and Social Sciences Librarian, **Emory University**) said his library initially purchased the whole 2012/2013 **Project Muse** collection, and moved to an ala carte model after that and they made use of the **Ex Libris** Primo discovery system for their records. They also found the use of the Counter BR4 turnaway reports to be of great use and discovered the use of eBooks at **Emory** was across the academic spectrum. **Palazzolo** was not able to say if users at **Emory** preferred e to print. They are hoping that their move to Shibboleth would allow for more granularity in assessing the use in the future. **Tedesco** (Assessment Librarian, **Yale**) mentioned that the library already owned 70% of the **Project Muse** titles in print. 34% of those titles had already circulated at least once. **Yale** had a lot of demographic data for their print use but less granular information for their use of electronic material, but already 24% of the **Project Muse** electronic material had been used. What **Tedesco** seemed to be implying though, is that for some titles (44 to be exact), the use is through the roof. In one semester those 44 titles had been accessed 16,000 times. **Yale** currently uses the Orbis system, and that is not an ideal way to discover the electronic titles. There is now a switch to Summon underway, and they are hoping this will improve the user experience, and they also hope to further study the use of the materials. **Leach** (Librarian for Western Languages Collections, **Harvard University**) explained that there would generally only be one format, print or electronic, and that makes it a bit difficult to assess preference. In 2013 they made the **Project Muse** eBook purchase, and they did attempt to assess only those titles held in both print and electronic for the purposes of this study. **Katherine** emphasized some of the important features that **Harvard** and other academic libraries value in an eBook,

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Both Sides Now: Vendors and Librarians — What Happens AFTER the Library Buys the Product?

Column Editor: **Michael Gruenberg** (President, Gruenberg Consulting, LLC) <michael.gruenberg@verizon.net>
www.gruenbergconsulting.com

In the world of sales, it is often said that "it's easier to close the initial sale than in actuality, keeping it closed." What that means is that salespeople all over the world are tasked with the job of selling a product or service to a defined market. In many cases, once the sale is made, the salesperson goes on to selling the same product to a new group of prospects. It's the old, "one and done" mentality for those salespeople. That's good for people who sell products/services that don't have to renew.

In selling products/services to the library market however, these sales reps are selling their wares in an annuity business. That means that if Pete, the regional salesperson for an aggregator sells Database "A" to the library in June of 2015, he will most assuredly be back to renew that product in early 2016. "One and done" doesn't work in our business.

Companies that provide database services to libraries in the information industry place significant emphasis on their salespeople to be renewing products sold in the previous years. That's because the revenue derived from those renewals is a crucial part of the company's financial health. Therefore, much attention is paid to making sure that salespeople sell a healthy mix of new and at the same, make sure that the majority of the renewals in their respective territories are secured.

Given this fact, information providers invest huge sums of money in CRMs for their customer-facing staff. This is the acronym for "Customer Relationship Management." It represents an approach to managing a company's interaction with current and future customers. It often involves using technology to organize, automate, and synchronize sales, marketing, customer service, and technical support.

By using the company's internal CRM, the salesperson knows well in advance when the current subscription(s) are up for renewal, current price of those subscriptions in relation to last year's price, how many times the customer has been contacted, if there were any unresolved problems associated with the customer, etc. In short, the good, the bad, and the ugly about all aspects of the customer appears on the screen.

The reality, however is that the CRM can only guide because ultimately, the salesperson and the librarian must interact with one another to achieve their mutual goals. So, once the sale is made, all efforts on the part of the sales rep will be to prepare for the renewal discussion, while at the same time figuring out new products that would fit for the customer's portfolio. Because both the company and a smart sales rep keenly understand that "No customer is a customer until they renew."

So, once the paperwork for a new business sale has been approved by both sides, and a date for the subscription to begin has been determined, what happens next? Here's what it should look like for the mutual success of both parties as they pursue a path leading up to the next year's renewal:

- ✓ July 1, 2015 – New database subscription for the Seymour J. Monkfish Memorial Public Library begins. The aggregator is supplying the library with their latest database on Trout Fishing to be accessed by 20 libraries throughout the state. Pete the salesperson who sold the database will either call or appear at the library to personally thank the information professional for the order. He will make sure the customer is satisfied and then, make an appointment to visit the library for another meeting in 90 days which will be on October 1, 2015.
- ✓ October 1, 2015 – Pete, in preparation for this meeting has noticed that the database is getting heavy use by ten of the libraries. In looking at the map, he realizes that those libraries are located near bodies of water which would explain the usage. Pete is concerned that the other ten libraries are showing minimal use. He needs to come to the meeting with a plan to get more usage out of the other ten or possibly risk a cancellation when this comes up for renewal in nine months. In advance of this meeting, Pete will contact the librarian to ascertain if there are any other issues that need to be discussed at their October 1st meeting.

Similarly, the information professional needs to prepare for the meeting with Pete. Now that the "Trout Fishing" database has been in the library for three months, how's it doing? Here are some questions for the info pro to ponder:

- ➢ Is the information contained on the database as advertised? Is it really complete and up-to-date?
- ➢ Is training for library staffs still needed and if so, can Pete set that up?
- ➢ How's it being used? We know the people who like to fish for trout are the target audience, but could there be others who do not fish for trout that may have use for the database and why?
- ➢ What do the usage statistics tell us?
- ➢ Have there been any technology issues?
- ➢ What have the users been saying about it to the library staff? Do they like it or not?

Pete meets with the librarian on October 1st, they have a productive session and both have agreed to follow-up on their "to do" items as a result of this meeting. They plan to email each other with the answers to the issues presented and both expect resolution within 30 days. Pete dutifully makes an appointment to get together again in 90 days. Since 90 days represents New Year's Day and neither Pete nor the info pro expects to be working that day, they settle on the next meeting to be on January 3, 2016.

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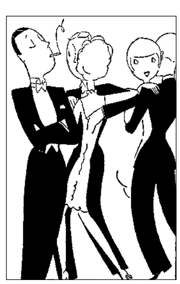
such as the fact that **Project Muse** is a stable platform where titles do not change and also that the books are DRM free. **Katherine** also emphasized something about the bibliographic record she felt was important for the user, and that is to have one record for print and electronic. It was a packed room and the speakers had to move on quickly, because of the limited time, but it was a great opening to a discussion that is very important, and I would expect these speakers to be back with more granular data next year.



*That's all the reports we have room for in this issue. Watch for the final reports from the **2014 Charleston Conference** in the Dec15-Jan16 issue of **Against the Grain**. Presentation material (PowerPoint slides, handouts) and taped session links from many of the 2014 sessions are available online. Visit the **Conference Website** at **www.charlestonlibraryconference.com**. — **KS***