And They Were There--Reports of Meetings

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Recommended Citation
Kubilius, Ramune K. (2018) "And They Were There--Reports of Meetings," Against the Grain: Vol. 28: Iss. 1, Article 28.
DOI: https://doi.org/10.7771/2380-176X.7286

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And They Were There

Reports of Meetings — 35th Annual Charleston Conference

Issues in Book and Serial Acquisition, “Where Do We Go From Here?” — Charleston Gaillard Center, Francis Marion Hotel, Embassy Suites Historic Downtown, and Courtyard Marriott Historic District — Charleston, SC, November 4-7, 2015

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 2015 Charleston 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 at www.charlestonlibraryconference.com, and https://2015charlestonconference.sched.org/, 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 2015 Charleston Conference blogger, Don Hawkins. The conference blog is available at: http://www.against-the-grain.com/category/chsconfblog/. The 2015 Charleston Conference Proceedings will be published in partnership with Purdue University Press in 2016.

In this issue of ATG you will find the first installment of 2015 conference reports. We will continue to publish all of the reports received in upcoming print issues throughout the year. — RKK

WEDNESDAY, NOVEMBER 4, 2015
AFTERNOON PRECONFERENCE SESSION

Negotiating with Vendors — Presented by Bernard “Buzzy” Basch (Basch Associates); Ward Shaw (Independent Investor); Bruce Strauch (Professor of Business Law, The Citadel); Dan Tonkery (Content Strategy); Michael Gruenberg (Gruenberg Consulting LLC)

NOTE: Adam Chesler (AIP Publishing) and Jay Ven Eman (Access Innovations, Inc.) were added as speakers in this session.

Reported by: Crystal Hampson (University of Saskatchewan) <crystal.hampson@usask.ca>

This session’s speakers, individually and collectively, brought considerable experience to the topic. Basch started off with what was

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a recurring theme through the session: when negotiating, be prepared and know what you need for your institution. Strauch said to be wary of boilerplates, read the contract, and know that anything said outside of the contact itself, e.g., in a sales pitch or presentation, is not part of the agreement unless written into the contract. Shaw advocated to be clear about what you want, be realistic, and create a win-win. Chesler recommended to inform yourself and ask for what you need, e.g., text/data mining. Gruenberg advised to write down your objectives and strategy (what you want, and what less you are willing to take). Also, ask the sales rep the question: “Can you defend your price?” Once a product is produced, it can be sold to many people and the cost of distribution goes down over time. Tonkery recommended to practice negotiating and to know what you want versus what you need. Shaw advised to write down your objectives and know what you need for your institution. During the question and answer portion of the program, including: if we make a mistake, other noteworthy observations and advice continuing into the audience participation portion of the program, including: if we make a mistake, there is different currency in academe though a mission and goals are still essential (Davis)... 

THURSDAY, NOVEMBER 5, 2015 MORNING NEPOLITAN SESSIONS

Think Like a Start-Up (or an Upstart) — Presented by Ann Okerson (Moderator, Center for Research Libraries); Peter Brantley (UC Davis Library); Mitchell Davis (BiblioLabs); Franny Lee (SIPX, ProQuest); Jack Montgomery (Facilitator, Western Kentucky University)

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

Moderator Okerson introduced the session and the panelists as the creative best, malefactors (in a good sense) of innovation, those who have used their creative energies. Brantley (formerly at New York Public Library) started out by sharing highlights from his career path, including working for DLF and Internet Archive where, to Brewer Kahle, “everything is always in start-up.” The work ethos he learned while working for HYPOSTHESIS is transferrable to a larger organization. His advice? Never wait, move fast, don’t wait for things to be perfect. Davis invited the audience to tour (with VIP passes) the locally based BiblioLabs (he’s a founder), located near the conference center. Its product is Biblioboard. His prior career was at CreateSpace that became part of Amazon (becoming part of the fulfillment space) and Minitex. Libraries can be at the table. He had the experience of acting as his own venture capitalist. His advice? The minimum bar is to be excellent. Lee shared that her legal background and experience in copyright policy spurred her to be involved in building something with technology. Ideas grow from a spark, and at the end of the day, there will be things to do, pulls and pushes, choices to make. Think like a start-up, she advised. The moderator and each speaker offered other noteworthy observations and advice continuing into the audience participation portion of the program, including: if we make a mistake, we’ll fix it solution/mindset (Okerson); be able to communicate why something is important (Lee); you can never do better than a group together…pursue radical transparency (Brantley); incremental failure is work…there is different currency in academe though a mission and goals are still essential (Davis)...

Industry Consolidation: Real Life Examples — Presented by Bob Nardini (ProQuest); Tommy Doyle (Elsevier); Doug Way (University of Wisconsin-Madison). Facilitated by Charles Waterston (University of Michigan)

Reported by: Crystal Hampson (University of Saskatchewan) <crystal.hampson@usask.ca>

The presenters provided a nicely balanced set of differing perspectives. Way began the session from a library’s point of view. He would like jobbers to be neutral, be open to new ideas, advance technology, make life easier, improve efficiency, and play nice with others. Assuming past performance is an indicator of future performance, making life easier, improve efficiency, and play nice with others. Assuming past performance is an indicator of future performance, Way is not optimistic about consolidations in the book industry. However, since companies do listen, Way advocated that librarians speak up rather than grumble behind closed doors. Nardini pointed out a long history of consolidation in the book industry. He stated that fragmentation occurs when services are split between many companies and that is one possible reason why services are all under one corporate roof. Doyle discussed using data to concentrate publishing efforts and resources on specific subject areas and to publish books that will be read. He also stated that consolidations are more successful if they are done for strategic fit rather than for essentially financial or opportunistic reasons.

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MORNING CONCURRENT SESSIONS

Elements of the Successful IR — Presented by Corrie Marsh (Old Dominion University Libraries); Dillon Wackerman (SFASU)

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

The presentation of Marsh and Wackerman included advice and examples. Libraries make connections and their staffs can be involved in many aspects of an institutional repository. Mediation can provide copyright checking and clearance. Documentation includes forms, policies, checklists. Project ideas and library expertise can be diverse, from helping launch a journal to sponsoring a specimen collection online (an example was given of the National Center for Pharmaceutical Crops — the site included metadata, in this case — geotags, patent numbers, article citations where a specimen was used). Extend the scope to include non-traditional, increase faculty involvement, look for unique collaborations. The IR can have a role in e-research. When doing marketing, have specific, tailored examples, be prepared with readership maps. The IR can have a role in e-research. When doing marketing, have specific, tailored examples, be prepared with readership maps. After the presentation, questions showed the many aspects of audience interest — embargos, metadata, viewers, formats, etc.

Faculty and Student Engagement with Streaming Video — Presented by Michael Arthur (University of Alabama); Beth Bernhardt (University of North Carolina Greensboro); Mike Eyler (Swank); Elizabeth Leonard (SAGE)

Reported by: Susannah Benedetti (University of North Carolina Wilmington) <benedettis@uncw.edu>

This session featured two academic librarians and two vendors discussing streaming video in academic libraries. Leonard provided findings from SAGE on how students engage with streaming videos, finding them on YouTube (71%), Google (45%) class Webpages (43%), and the library Website (32%), and how guiding them to the library’s video content is critical. Eyler reported on how faculty use Swank’s streaming feature films to demonstrate discipline-specific content in creative ways (The Perfect Storm and Captain Philips for maritime studies; episodes of The Office for business ethics). Bernhardt spoke about what faculty do (and don’t) understand about streaming video, including public performance rights, copyright laws, the costs of streaming video, and issues with “transferring” VHS. She noted that librarians must be the educators about these complex issues. Arthur spoke about how libraries can promote streaming videos, including active collaboration between subject librarians and faculty, creating separate funding for streaming videos, bringing in vendors to do presentations at department meetings, and focusing on discoverability in LibGuides and A-Z lists. All of the presenters emphasized the role of librarians in improving discoverability, working directly with faculty on the ins and outs of this valuable and emerging format, and learning how students engage with streaming video in order to provide the best content.

From Usability Studies to User Experience: Designing Library Services — Presented by Lea Currie (University of Kansas); Julie A. Petr (University of Kansas); Kate Montgomery (Tulane University); Miri Botzer (Ex Libris Group)

Reported by: Beth Bohstedt (Hamilton College) <bbohstedt@hamilton.edu>

This session illustrated two perspectives of how surveys and other tools were utilized to improve services in their libraries, specifically the use of Ex Libris’ Primo as a discovery layer. The University of Kansas wanted to improve the user experience of Primo; in order to do this, they first had to ensure that the staff was comfortable with the tool. After the staff examined its strengths and weaknesses, they made suggestions for improvement, and then tested it again, resulting in a smoother and more enriched experience for their patrons.

Tulane University reached out to a broader audience for their usability surveys, as they prepared to roll out a redesign of their Primo interface. They undertook an iterative cycle, testing, making improvements based on the suggestions, then testing again.

Ex Libris also presented on the use and recent improvements of the Primo interface.

Gathering the Needles: Evaluating the Impact of Gold Open Access Content within Traditional Subscription Journals — Presented by Jill Emery (Portland State University); Alison Bobal (University of Nebraska Medical Center)

Reported by: Crystal Hampson (University of Saskatchewan) <crystal.hampson@usask.ca>

The two presenters looked at 2014 JR1-GOA [COUNTER Gold Open Access report] data from Elsevier, Nature Publishing Group, SAGE, Springer, and Wiley (but not, as indicated in the program, OUP or Taylor & Francis). Emery began the session by noting that more content is being published as gold OA by traditional publishers as a result of OA policies, particularly in Europe. Release 4 of Project COUNTER includes the new JR1-GOA report for gold open access usage. We would like to be able to tell what the impact of gold OA is on subscriptions. The presenters limited their investigation to the publishers they had in common, plus Wiley at PSU only. Bobal outlined the publishers’ advertised practices regarding revenue from OA fees in hybrid journals and then provided examples of JR1-GOA usage from 2014. Emery outlined potential uses for the information in JR1-GOA: a baseline for future evaluation, promotion and advocacy for OA, a new type of usage statistics, and a negotiation point for subscriptions. In response to a question from the audience, the presenters noted it is difficult for publishers to break down statistics for open access usage that occurs after an embargo period is lifted.

Mind the Gap: Find and Fix the Mismatches Between Faculty and Academic Librarians — Presented by William Cross (NCSU Libraries); Meredith Schwartz (Library Journal); Jennifer Albers-Smith (Gale Cengage Learning); Tamara Venit-Shelton (Claremont McKenna College)

Reported by: Emily O’Connor (Rasmussen College) <Emily.OConnor@rasmussen.edu>

This panelist session provided the results of a summary co-authored by Library Journal and Gale outlining the perceptions of both faculty and librarians of library services and resources, and best practices to close the gap in perception.

The first part of the session reviewed the details of the survey. Survey results are available here: http://lj.libraryjournal.com/2015/09/academic-libraries/closing-gap-librarian-faculty-views-research/. The continued on page 54
panelists focused on best practices in the second half of the session. The general theme of this focus was that faculty need to be communicated to proactively about what librarians do, and can do (that librarians teach and work with faculty who teach, for example). Challenges may arise if some faculty think that librarians should be “invisible.” This faculty perception conflicts with librarians’ goals of providing services that need to be promoted or marketable. Best practices included librarians building upon their breadth of expertise outside of traditional library duties, marketing the library as the go-to for a variety of services, and “forcing” partnership between faculty and librarians through committee work, grant projects, and similar initiatives. The session was presented as described and many attendees expressed interest in future studies complementing this first wave of research.

[To see the full report, “Bridging the Librarian-Faculty Gap in the Academic Library,” visit www.thedigitalshift.com/research.]

Outsourced and Overwhelmed: Gaining a Grasp on Managing Electronic Resources — Presented by Matthew Harrington (North Carolina State University)

In his presentation, Harrington began by exploring the challenges of managing electronic resource metadata. He addressed commercial Electronic Resource Management (ERM) services, their pros and cons, and why this requires libraries to monitor the metadata for accuracy. Using graphs and charts, he was able to demonstrate the complexity of the problem and make a case for a homegrown database, using Microsoft Access software to automate many of the management tasks.

He then walked the audience through some of the major considerations that went into to developing the database, such as identifier choice and linking. He shared screenshots of the navigation and input portals that staff used in their day-to-day activities, briefly touching on the general workflows needed. He then discussed how the database has been recently redesigned to meet changing needs of staff, and introduced the Integrated Multi-Package Reconciliation Tool (IMPART) database design. He discussed some of the design considerations and launched a brief live demonstration for the audience. Attendees were very interested in seeing the database in action and would have preferred a little more time for this portion of the presentation.

Toward Improved ROI: Outcomes of Researching Current Pay-Per-View Practices — Presented by Marija Markovic (Acute Source, Inc.); Steve Oberg (Wheaton College, IL); Connie Mead (Wheaton College, IL)

NOTE: Marija Markovic did not participate in this presentation.

Reported by: Marty Coleman (Mississippi State University) <mcoleman@library.msstate.edu>

This session reported on outcomes of Wheaton College moving from big deal journal packages to a combined Pay-Per-View (PPV) and targeted subscription model. This session was built on a talk given at last year’s conference and the executive summary of the conversion is slated to be published in a future issue of Against the Grain. Oberg began with the background and review of the literature. The need for this project arose from the rising cost of big deal journal packages and the low usage of titles from those packages. For each title, they analyzed usage statistics and subscription costs to calculate the cost of use per year. These statistics were used to determine which titles had enough demand to justify the cost of a subscription. Wheaton chose to have unmediated PPV — the student did not know or need to know that the access model was different. Mead reported on the results of the conversion. Costs in the initial years were substantially less and demand has steadily grown from 7,600 in FY 14 to an estimated 13,000 in FY 16. Monitoring usage was necessary as they wanted to be sure they were not paying for access to something they should have perpetual access to. A large number of requests for a specific title may trigger a subscription, or lack of use may be used to cancel a subscription. Oberg and Mead were very pleased with their results and stated that PPV may not be for everyone. Moving to the PPV model has provided improved user access to content with better ROI on collection dollars.

What ARE We Thinking? Collections Decisions in an Academic Library — Presented by Linda Galloway (Syracuse University); Natasha Cooper (Syracuse University); Doug Morton (Elsevier); Shannon Pritting (SUNY Polytechnic Institute)

Reported by: Christine Fischer (University of North Carolina at Greensboro, University Libraries) <cmfische@uncg.edu>

Cooper began the panel presentation with a look at the many challenges related to collections decisions, including purchasing models, formats, and licensing. A major issue is communicating institutional needs to publishers and vendors, and that became the overarching theme of the discussion. Representing a large private interdisciplinary university, Galloway discussed what is considered when adding new resources, including usability of the content, responsive design, compliance with web accessibility guidelines, and a preference for access by unlimited simultaneous users. Pritting described the complexities of building a research library from the ground up for a small, focused university with high-level researchers. Communication with vendors is critical, and it brings challenges such as negotiating pricing and successfully coordinating quick purchases when funding becomes available with a short turnaround. The session concluded with a vendor/publisher perspective. Morton discussed the tools and reports that can help inform decision-making. Vendors can provide value beyond just the products they sell, Morton stated, as he encouraged librarians to keep them informed of current and upcoming projects for which they could provide support.

THURSDAY, NOVEMBER 5, 2015

LIVELY LUNCH DISCUSSIONS

Changing Academic Book Market Landscape: What's Next? — Presented by Rick Lugg (OCLC); Carol Cramer (Wake Forest University); Alan Jarvis (Taylor & Francis); Kari Paulson (ProQuest); Mark Sandler (Center for Library Initiatives)

Reported by: Jennifer C. L. Smathers (The College at Brockport, SUNY) <jsmather@brockport.edu>

As always seems to be the case with a “What Next?” session, it started with history, the sordid, yet long and glorious, history of selling and buying books. Lugg served as MC and leading historian for the 80 or so attendees. On the changing aspects of the marketplace, with smaller publishers being bought up by larger firms, Jarvis said, “I don’t even know what business as usual looks like.”

The most enlightening revelation came from Paulson, who indicated that publishers are fixated on selling titles, because they can forecast how many titles they will sell and use that as leverage for obtaining financing. Thus their inherent dislike of more ephemeral and unpredictable sales models (individual chapters and short term loans) that negatively impact their ability to gain financing. It caused me to wonder if this need for financing is related to the number of venture capitalist firms now holding publishers/jobs.

While the session spent more time slogging through the backstory than its description seemed to promise, it was a necessary exposition continued on page 55
for those new to the game. Attendees came away with a better understanding of the motivations surrounding rapidly-changing purchasing models for monographic content.

The Changing Nature of OA Journals: Helping Scholars Identify the Good, the Bad, & The Political — Presented by Matthew Torrence (University of South Florida); Susan Ariew (University of South Florida)

Reported by: Neil Foulger (Levi Watkins Learning Center, Alabama State University) <nfoulger@alsu.edu>

This session provided a useful overview of the Open Access (OA) movement. Both Torrence and Ariew presented the types of OA journals, the politics of the OA movement, how predatory OA publishers operate, the pros and cons of Jeffrey Beall’s blog and List, and solutions to predatory OA publishers. There were four types covered: three actual and one ideal (no money needed to publish). The politics of the movement relate to free exchange of knowledge versus pricing models which include lack of oversight of OA publishers. This lack of oversight allows for some OA publishers to take advantage of researchers seeking publication, thus being “predatory.” The chief signs of a predatory OA publisher include lack of transparency and the tactic to request for author’s information and then charging the author to publish. Beall was described as an OA skeptic who supports traditional publishing despite his list’s purpose to assist librarians and scholars in avoiding scholarly publishing scams. The chief solutions discussed were the need to warn faculty researchers about predatory OA publishers and the creation of more tools to help discern reputable OA publishers. Audience members shared opinions and information regarding experiences with OA, making this session very informative and lively.

Facilitating Sharing Among Researchers — Presented by Alicia Wise (Elsevier); Maggie Farrell (Clemson University)

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

With chairs drawn in a circle and led by the session facilitators Wise and Farrell, participants, librarians, and publishers shared experiences and insights. It is relatively obvious that there are different sharing needs at different points in the research cycle, both during and post research and publication. In sharing, the goals are to support research and to provide access to research output. But what are researchers’ practices? Are they sharing links to their full-text or actually sharing articles? (Mention was made of another conference session, “The Secret Life of Articles: From Download Metrics to Downstream Impact,” in which the studies showed that the second seemed more prevalent.) The popularity of portals such as ResearchGate can be challenging for publishers, but partnerships have developed between libraries and publishers that can benefit researchers, too. For example, the University of Florida has worked with Elsevier to allow a search in the institutional repository to pass through to Elsevier-published institutional authors’ works in ScienceDirect. An API allows an entitlements check to be done to lead to the final version or to the manuscript. Wise made the group aware of draft “STM Principles for Article Sharing on Scholarly Collaboration Networks” that were posted for public comment earlier in 2015. The round robin discussion followed the traditional “lively lunch” format, with interesting updates and fragments that abounded, but each attendee will have to determine where to go from here.

Vendrbarians: Librarians Who Work for Vendors and the Value They Provide to Library Customers — Presented by Robert Boissy (Springer); Charlie Remy (University of Tennessee at Chattanooga); Marliese Thomas (Ex Libris); Jalyn Kelley (Client Services Manager, IEEE)

Reported by: Mari Monosoff-Richards (Librarian, Michigan State University) <monosoff@mail.lib.msu.edu>

This panel was organized to teach the audience about the jobs librarians take with vendors. They spoke about the pros (more money but not as much as you’d think, greater opportunities to climb the career ladder, travel) and cons (former colleagues who feel betrayed, lack of understanding about what librarians can do within the company) as well as what their jobs consist of. Their librarian training often plays a large role in the work that they do.

Each of the vendrbarians encouraged librarians to speak to their vendors about what can be done better. At IEEE, Kelley said she presents a customer wish-list to her programmers once a quarter and it influences the product development roadmap. Someone warned that not all librarian desires are accomplishable, but another member of the panel chimed in that often desired changes are in the works or are new features that the library didn’t know about and can be quickly activated. All three panelists encouraged librarians to speak with their vendors often. As vendrbarians, they act as intermediaries and educators, not just sales people. Professionally they feel the responsibility to advocate for librarians within their organization.

Rumors

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The eBook. What are we going to do about it? The divide between those who like e and those who like p is almost as bad as the presidential elections (okay, I am exaggerating). But it seems that I have talked to more and more people who prefer the print book rather than the eBook. Hmmmm... me... I like them both. Just finished reading Vanity Fair (Thackeray’s not the magazine) and I have to admit I enjoyed reading it on my iPad. My son on the other hand will not read books on devices and I am not going to say how much older than he is I am. Anyway, Jim O’Donnell (the director of the ASU Libraries and the keynote speaker at the 2015 Charleston Conference) recently visited our library. The library staff had a special hour plus interview with him to discuss interlibrary loan operations, renovating a library, engaging patrons, and eBooks. Jim is vocal about all the issues with eBooks — how they are all on different platforms, have different usage configurations, can print only a certain number of pages, etc., etc. You’ve heard it all.

To learn more, look at our Penthouse Suite Interviews for the 2015 Charleston Conference. We have interviews with Erin Gallagher, Jim O’Donnell, Gary Price, Mark Sandler, Carol Tenopir, Alicia Wise and Courtney Young. They have been edited into small 10-14 minute snippets which makes them very watchable. Check them out!

http://www.charlestonlibraryconference.com/video/atg-penthouse-interviews/

That’s it for now!