

February 2017

And They Were There-Reports of Meetings

Sever Bordeianu

University of New Mexico, Albuquerque, sbordeia@unm.edu

Ramue K. Kubilius

Northwestern University, r-kubilius@northwestern.edu

Follow this and additional works at: <https://docs.lib.purdue.edu/atg>



Part of the [Library and Information Science Commons](#)

Recommended Citation

Bordeianu, Sever and Kubilius, Ramue K. (2017) "And They Were There-Reports of Meetings," *Against the Grain*: Vol. 29: Iss. 1, Article 32.

DOI: <https://doi.org/10.7771/2380-176X.7731>

This document has been made available through Purdue e-Pubs, a service of the Purdue University Libraries. Please contact epubs@purdue.edu for additional information.

And They Were There

Reports of Meetings — SALALM 61, and the 36th Annual Charleston Conference

Column Editor: **Sever Bordeianu** (Head, Print Resources Section, University Libraries, MSC05 3020, 1 University of New Mexico, Albuquerque, NM 87131-0001; Phone: 505-277-2645; Fax: 505-277-9813) <sbordeia@unm.edu>

SALALM 61 — University of Virginia,
Charlottesville Virginia — May 9-13, 2016

Reported by: **Claire-Lise Benaud** (University of New Mexico)
and **Suzanne Schadl** (University of New Mexico)

SALALM 61, the organization's 2016 annual conference was hosted by the **University of Virginia** in Charlottesville from May 9th to May 13th. **SALALM's (Seminar on the Acquisition of Latin American Library Materials)** meeting is a catch all for Latin American Area Studies librarians and "*Libreros*," book dealers from Latin America and Spain. The theme this year, "*Nuestro norte es el sur: Mapping Resistance and Resilience in Latin American, Caribbean, and Iberian studies*" encouraged large roundtable discussions and small panel sessions that addressed means by which Latin Americanists, Caribbeanists and Iberianists resist "one size fits all" globalizing trends that privilege the Global North (that's the U.S. and Western Europe) in the academic discourse of the areas. Collections from Latin and Spanish America are important parts of this resistance because they help propel Latin American voices in the U.S. scholarly mix. The goal of the roundtable discussions was to foster dialogue between librarians and other stakeholders such as area studies program administrators, faculty, doctoral students, and publishers.

From our perspective, the hottest button issue at this conference was open access because many Latin American institutions (particularly in Brazil, Argentina and Chile) led charges in open access — some making dissertations and university funded journals freely available as early as 1996. In return, many of them bore the brunt of declining income from abroad matched with higher subscription costs from the likes of **ProQuest** and **Gale** (often for their own cultural patrimony). Needless to say post-custodial partnerships like Guatemalan National Police Historical Archive at the **University of Texas** and the Fideicomiso Plutarco Elias Calles y Fernando Torreblanca Archive at the **University of New Mexico** speak to part of this problem. They do not, however, address the international preference (even among scholars in Latin America) for scholarship from the U.S. and Western Europe.

One of the most articulate critiques of an uneven open access system came from **Micaela Chávez Villa** at the **Colegio de México**, with whom **Suzanne Schadl**, **SALALM** President-Elect, is honored to plan the **2018 SALALM Conference** in the Centro Histórico, Mexico, DF. An interesting counter-point came from **Melissa Gasparotto**, a colleague at **Rutgers**, who addressed how more nuanced developments in Spanish language metadata creation and retrieval might help make Latin American resources in the **HathiTrust** (and beyond) increasingly discoverable and thus more available to Latin Americans.

Other sessions were thought provoking. **Library of Congress** Subject Headings have been a political battleground for many years, and again this issue came to the forefront this year. **Tina Gross**, cataloger at **St. Cloud University**, discussed the now defunct subject heading "Illegal Aliens" and how subject headings are embedded in our history and in

biases. The movement to promote this change started with **Dartmouth** students, not librarians, and they proposed the heading "undocumented immigrants." Under pressure, the **Library of Congress** replaced "Illegal Aliens" with two headings "Noncitizens" and "Unauthorized immigration." **Gross** drafted a document, which **SALALM** approved, to be sent to the U.S. Congress to support the change.

Lisa Gardinier working at the **University of Iowa** discussed collecting zines. Most of the topics covered in zines are far outside of the mainstream and many writers use pseudonyms. When cataloged, their real names appear in the catalog record. This creates interesting issues when authors wish to remain anonymous and consider their zines to be semi private — just for their friends or community. This generated interesting discussions because issues of privacy are common in the archival world but usually not much discussed in the cataloging community.

Collaboration among libraries has been a goal for decades. The most interesting presentation was the 2CUL Project between **Cornell** and **Columbia University**. **Sean Knowlton** and **Socrates Silva** presented briefly on the overall objectives of the Columbia/Cornell initiative (2CUL) which started in 2013 with a focus on their efforts in the Latin American collection development. Their project was two-fold: to eliminate duplication of low-use Latin American print materials and for the **Columbia** librarian to do reference and outreach to **Cornell** students and faculty. Both libraries have distinct collecting policies on geographies and topics. The project was premised on print sharing and the transition to eBooks in the future. While collection development was conceived collaboratively, materials budgets remained separate. Both libraries continued to collect core materials. Using WorldCat, they determined what titles they held in common and what titles were held only by **Columbia** and only by **Cornell** for 2000-2011. For several of the Latin American countries in which the libraries were collecting, the duplication rate was close to 50%. By 2015, they drastically reduced the overlap between the two institutions. The duplication rate fell to 10% or less. This collaboration also involved outreach and research services with the librarian from **Columbia University** providing reference services to **Cornell**, including on-site visits twice a year and communicating via phone, email, and Skype.

Beyond the conference theme, **SALALM** included traditional business meetings and the *Libreros* book exhibit. It also provides a platform for regional group meetings and consortia including the Latin American Materials Project (LAMP) and the Latin American Research Resources Project (LARRP). These projects have long histories of pooling institutional and expert resources to preserve and share hard to find materials — in partnerships that cross state and national lines. You can check the fruits of these labors at: <http://www.crl.edu/area-studies/lamp/collections> and learn more about our collaborations at: <http://www.crl.edu/grn/larrp/about-larrp>.

Next year, **SALALM** will meet in Ann Arbor, MI, May 20-24, 2017. In 2018, **SALAM** will meet in Mexico City at the **Colegio de México**. 🍷

Being Earnest with Collections from page 71

projects and will build on the work of the task force.

Communicating well about collections within the library was crucial to the success of the review process and will continue to be crucial as the library makes collection deci-

sions and defines collections strategies going forward. While the work of the task force laid the groundwork for improved communication about collections, the work is not complete. The new standing committee will have to continue to communicate well with subject librarians in timely and consistent manners in order to succeed. True two-way communication builds both trust and buy-in with broad collections decisions and strategic directions. We must all

earnestly seek to have real, continuous dialogue about collection priorities, sharing information and listening well to one another. 🍷

Endnotes

1. **Georgetown University's** fiscal year runs from July to June, so FY15 encompasses July 2014 through June 2015.

Issues in Book and Serial Acquisition, “Roll With the Times or the Times Roll Over You,” Charleston Gaillard Center, Francis Marion Hotel, Embassy Suites Historic Downtown, and Courtyard Marriott Historic District — Charleston, SC, November 1-5, 2016

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 **2016 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 the online conference schedule at <https://2016charlestonconference.sched.org/> from which there are links to many presentations’ PowerPoint slides and handouts, as well as links to video for select sessions. The conference blog by **Don Hawkins** is available at <http://www.against-the-grain.com/category/chsconfblog/>. The **2016 Charleston Conference Proceedings** will be published in partnership with **Purdue University Press** in 2017.

In this issue of **ATG** you will find the first installment of 2016 conference reports. We will continue to publish all of the reports received in upcoming print issues throughout the year. — **RKK**

TUESDAY, NOVEMBER 1, 2016 CHARLESTON SEMINARS – PRECONFERENCES

Data Visualization from Scratch — Presented by **Lindsey Cronk** (University of Houston Libraries)

Reported by: **Kat Landry Mueller** (Sam Houston State University) <kmueller@shsu.edu>

This preconference session covered an emerging technology trend — data visualization. Of the approximate 35 registered attendees, there was a wide variety of libraries represented as well as varying levels of individuals’ technical expertise. After initial introductions, instructor **Cronk** provided an overview to Tableau, one of the data visualization softwares libraries are using, as well as demonstrated several visualization dashboards she has created for the **University of Houston Libraries** using that software. Then participants were walked through the process of importing provided sample data. **Cronk** then illustrated the various styles, types and options that this software offers. **Cronk** also facilitated discussions as to the possible roles data visualization can play in libraries, offered a few ideas based upon her experiences thus far, and encouraged attendees to think outside the box and typical spreadsheet setup when utilizing Tableau. During the hands on demonstration instructor feedback, guidance and “tips & tricks” were offered to attendees as they worked to manipulate sample data, and opportunities were available for attendees to import their own data. Outside of considering other data viz software and even limitations between the free/paid software versions, attendees were encouraged to think how much data manipulation or cleanup is required prior to uploading as this is a key time factor in creating data visualizations.

Introduction to Data Curation — Presented by **Christopher (Cal) Lee** (University of North Carolina, Chapel Hill); **Jonathan Crabtree** (University of North Carolina, Chapel Hill)

Reported by: **Theodora Belniak** (SUNY at Buffalo Law Library) <tbleniak@buffalo.edu>

This preconference session was billed as “an introduction to the primary opportunities, challenges, principles and strategies for addressing data curation within the context of libraries and archives,” and it did not disappoint. **Crabtree** and **Lee**, both of **UNC, Chapel Hill**, have deep

Against the Grain / February 2017

experience teaching and using data curation techniques, and they did an excellent job of outlining the issues and nomenclature surrounding data curation. They taught through demonstration, beginning with the download of their presentation materials. At a quick pace, they discussed everything from the history of data curation in institutions to how data curation manifests in modern institutions.

Data curation is a gnarly thing, and the presenters posited the following question during their introduction: “So, what do I need to know to ‘do’ digital curation?” The answer, one which librarians are becoming more comfortable with, is: “it depends.” In the brief time we had, the presenters did their best to outline the infrastructures developed around digital curation and the intersections of different professional methodologies and goals, and how those things influenced the how, why, and when of digital curation.

Crabtree and **Lee** approached digital curation in a holistic and approachable way. Although I’m a digital curation novice on my best day, this session was an excellent introduction to the topic and gave me plenty to explore after the session was finished.

WEDNESDAY, NOVEMBER 2, 2016 MORNING PRECONFERENCES

Predators, “Pirates” and Privacy: Educating Researchers on New Challenges in Publishing — Presented by **Heather Staines** (Session Organizer, ProQuest/SIPX); **Rick Anderson** (Moderator, University of Utah); **Regina Reynolds** (Library of Congress); **David Crotty** (Oxford University Press); **Todd Toler** (Wiley); **Todd Carpenter** (NISO); **Craig Griffin** (Silverchair Information Systems); **Ken Varnum** (University of Michigan Library)

NOTE: This preconference was offered in collaboration with the Society for Scholarly Publishing (SSP).

Reported by: **Kathleen Berryman** (Cabell’s International) <kathleen.berryman@cabells.com>

This session was divided into sections that discussed predatory publishing, piracy, and privacy in academia. After an introduction and overview, **Anderson** began the Predators section, followed by **Reynolds** and **Crotty**. They defined predatory publishing, each from their own perspective, and discussed who is being preyed upon, who the predators are, what leads to predatory publishing, and possible solutions. They also talked about **Beall’s List** and the controversy surrounding his approach to predatory publishing.

In the second section, **Toler** and **Varnum** spoke about the issue of piracy. Sci-Hub was the main topic in this section, and other types of piracy were briefly defined. **Toler** also talked his ideas on how to remove the barriers to accessing articles. Several people from the audience weighed in on the issue of piracy and how it affects both publishers and authors, as well as how password sharing puts both university and personal information at risk.

The third section began with **Carpenter** defining privacy and the issues surrounding it. He then led an open discussion with **Varnum**, **Toler**, and **Griffin**. The discussion centered mainly on user privacy rather than content privacy.

The session then broke into three round table discussions. Each round table focused on the problems and possible solutions of the topic, as well as how prepared the academic community is for each solution. An announcement was made that **Cabell’s International** is in discussions to take over and expand on the work of **Jeffrey Beall** by launching its

continued on page 74

<<http://www.against-the-grain.com>> 73

And They Were There
from page 73

own blacklist, in the first quarter of 2017. This was well-received by both the speakers and the audience.

Overall, the session went very well, with plenty of time for questions and open discussion between speakers and audience members.

WEDNESDAY, NOVEMBER 2, 2016
AFTERNOON PRECONFERENCES

Exploring New Roles of Academic Libraries in a Changing Knowledge Landscape — Presented by **Jacob Jaskov** (User Behavior Consultant)

NOTE: Slated speaker, Jacob Jaskov, did not present in this preconference. Michael Winkler (OLE, Open Library Environment) and Sebastian Hammer (Index Data) were the presenters.

Reported by: **Theodora Belniak** (SUNY at Buffalo Law Library)
<tblniak@buffalo.edu>

Winkler and **Hammer** began this session with big questions: how do we encourage a broadening of the space around libraries' traditional roles? How do we move beyond a nostalgic representation of libraries toward innovation and engagement? They discussed their roles in the development of FOLIO, and the novel ecosystem they envision through FOLIO in which organizations and people can plug into its utility and interconnectivity without needing to recreate the underlying infrastructure each time it is implemented at an organization.

Winkler and **Hammer** then turned the conversation over to the attendees, asking, in respect to libraries and the profession: "what keeps you up at night?" The attendees were vendors and librarians, and we heard and shared interesting perspectives. Some of the concerns were managing legacy print collections, ownership vs. access, supply chains, open access, and high touch services. Despite our disparate backgrounds and concerns, I think there was a common thread running through the group's comments: things are changing, we aren't sure what the impacts of the change will be, but we think it's important to preserve the central role of libraries. Although unsettling, this session was an excellent open space to contemplate solutions and possibilities.

THURSDAY, NOVEMBER 3, 2016
MORNING PLENARY SESSIONS

"You Can't Preserve What You Don't Have - Or Can You?" Libraries as Infrastructure for Perpetual Access to Intellectual Output — Presented by **Ann Okerson** (Moderator, Center for Research Libraries); **Anja Smit** (Utrecht University)

Reported by: **Tony Horava** (University of Ottawa)
<thorava@uottawa.ca>

Smit, this keynote speaker, focused on what she sees as the core mission of the library — to ensure perpetual access to knowledge. Although libraries have changed greatly across the ages, what hasn't changed is our core mission — we work for the long term. The Internet is the perfect medium to ensure perpetual access to knowledge. The added value of libraries is in providing access to knowledge. The Dutch national approach to knowledge discovery and preservation is based on the Gold OA approach. This has meant negotiating agreements with major publishers such as **Wiley**, **Springer**, **Elsevier**, **ACS**, **T&F**, **Oxford**, and **Kluwer**. However, perpetual access rights are not on the agenda. It is hard to make the case for "eternity." Thus an old problem is not being addressed by these national offsetting agreements. **Smit** argued that we need to ensure that perpetual access to knowledge is at the top priority of our agenda, and on the agenda of other stakeholders as quick as possible. Therefore we need to find partners to develop

long term preservation infrastructures. The problem is much bigger than books and journals — it includes film, video, music, and other media. Collaboration is crucial. Therefore we should spend less on collection development and more on preservation/discovery. I found it rewarding to listen to a speaker who sees our core mission as remaining remarkably unchanged across space and time, despite the quantum leaps of technology and services that we have witnessed in recent decades.

Libraries as Convener, Enabler, Distributor, Advocate and Archive in the Future Knowledge Economy — Presented by **Anthony Watkinson** (Moderator, CIBER Research); **James G. Neal** (Columbia University and American Library Association)

Reported by: **Nancy Hampton** (Xavier University of Louisiana)
<nhampton@xula.edu>

Neal opened this plenary session with an account of the constant state of chaotic change that libraries have entered. The conditions consist of leadership turnover, shifts in professional staffing, hybrid strategies, and essential creativity in advancing our individual and collective visions. The necessary elements presented to deal with these challenges are to expand our impact on the communities we serve, achieve power to command authority, influence and respect, and to focus on emphasizing action and "getting things done" rather than just ideas.

This session proposed that libraries of the future are to be conveners, enablers, distributors, advocates and archives and less infrastructure, platform, repository and portal. In addition, by the year 2026, there will be no information or service product industry targeting their product to the library.

With a humorous delivery using a speculative account of five lost biblical commandments, **Neal** recommended that libraries incorporate five rules in the near future. First, preserve digital and born digital content in order to prevent a digital dark age. Second, become the experts on privacy, civil liberties, network neutrality, copyright, and intellectual property. Third, support the needs of users and readers. Fourth, use radical strategies to cooperate and collaborate for a deeper commitment to shared networks and resources. And fifth, work together to improve scholarly communication and publication.

THURSDAY, NOVEMBER 3, 2016
MORNING NEAPOLITAN SESSIONS

Building the Knowledge School — Presented by **Anthony Watkinson** (Moderator, CIBER Research); **David Lankes** (University of South Carolina)

Reported by: **Morag Stewart** (University of Washington Libraries) <mkstew@uw.edu>

As the program described, **Lankes** shared his thoughts on the "Information School" (or "I-school") phenomenon and what he sees as a needed transition into what he calls the Knowledge School. Interspersed with amusing anecdotes, the presentation touched on the library/information science divide and issues surrounding program name changes and the creation of undergraduate information science programs. Such programs are of value according to **Lankes** for the support structure within society that they help to foster, not for creating more librarians. The proposed knowledge school would bring back into cohesion the values and service aspects of librarianship with the technology and social science focus of the information school. This would create a program focused on participation and impact to address the needs of the "knowledge society."

What value do librarians and information scientists bring to this knowledge society of the present and near future? **Lankes'** answer involves moving away from information consumer culture with an emphasis on promoting access to materials and towards greater participation and coordination of what he refers to as the knowledge infrastructure. As he put it, "It's about doing." It envisions increasing engagement in

continued on page 75

the community outside the classroom in order to solve problems and improve decision making.

Rolling with the Punches... and Punching Back: The Millennial Librarian's Approach to Library Budgets and Acquisitions

— Presented by **Bobby Hollandsworth** (Moderator, Clemson University Libraries); **Ashley Krenelka Chase** (Stetson University College of Law); **Lindsay Cronk** (University of Houston Libraries); **Ellen Frentzen** (Boston University School of Law); **Christine Weaver-Pieh** (Medina County District Library)

Reported by: **Julie Gaida** (Pacific University)
<juliegaida@pacificu.edu>

Millennials (or people born in or around the 1980s and 1990s) have begun to take on leadership roles within libraries. The presentation began with a list of traits commonly attributed to millennials, both negative (narcissistic, cynical, needy) and positive (tech-savvy, compassionate, confident).

The panel then answered questions about their experiences as millennial librarians within certain categories such as relationships, decision making, projects/priorities, and leadership. The ensuing discussion covered dealing with times when age has been a challenge; interactions with vendors; how collections will change under the direction of millennial leaders; approaches to budgeting and dealing with budget shortfalls; and the importance of taking responsibility as a leader.

The panel emphasized that, no matter our generational differences, we as librarians are all united in our service to our communities. The members of the panel are contributing to an upcoming book, *Millennial leadership in libraries*, which was borne out of a desire to bridge any generational gaps and address the impact of negative intergenerational interactions.

Working in Partnership to Support Quality Research —

Presented by **Edward Collieran** (Moderator, Triumvirate Content Consultants); **Jayne Marks** (Wolters Kluwer Health)

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

Collieran introduced the session and speaker, **Marks**, a veteran of over thirty five years in publishing. **Marks** agreed with that day's keynote, **Neal**, that we are in a state of constant change, but did not agree that the community of interest between publishers and librarians is narrow, arguing that both are in the same community of interest. Authors / researchers are the most important people, and they are presented with a complex and difficult myriad of choices. Training and information can range from support services (language and scholarly processes), mentoring, and peer review. The process for emerging markets publishing is the same, but the context may be different. Authors are still confronted with choices about where to publish (**Marks** discussed authenticity "masqueraders"), where to start. Peer review is the backbone, archiving is a shared role, discovery is of interest to both. Helping to make these work is metadata curation, linking, services such as ORCID, FundRef, DOI, ensuring a version of record and quality research.

She posed the question — How do Scopus, ISI, JCR, Altmetrics, etc. tell how patrons see quality? Marketing of publishers takes place through analytics (to relevant audiences), social media, data visualization, technical skills, teamwork, newsjacking, soft skills improvement of collaboration and outcomes. In summary, nurturing great research is an essential partnership between librarians and publishers.



Author Identifiers in the Research Life-Cycle — Presented by **Joelle Masciulli** (Thomson Reuters); **Mary Ellen Sloane** (Middle Tennessee State University); **Alice Meadows** (ORCID); **Chris Erdmann** (North Carolina State University)

NOTE: Wright (ORCID) was an addition to the slate of speakers, standing in for Alice Meadows, who was not able to attend the session. Thomson Reuters is now known as Clarivate Analytics.

Reported by: **Anna R. Craft** (The University of North Carolina at Greensboro, UNCG University Libraries) <arcraft@uncg.edu>

This session provided a variety of perspectives on the use of author identifiers in the world of scholarly publishing.

Wright gave an overview of ORCID. He mentioned challenges, including the measurement of impact, and discussed the value of ORCID identifiers for researchers, including integration with a variety of online entities and the ability to create connections and affiliations online.

Masciulli brought perspective from her work at **Clarivate Analytics** (formerly **Thomson Reuters**), where she serves at Head of Research Discovery. She discussed usage of ResearcherID, reporting that approximately 750,000 ResearcherIDs have been minted, and that 36% of those authors also have an ORCID ID. She also discussed integration between ResearcherID and other products, including ORCID, Web of Science, ScholarOne, and EndNote.

Erdmann, currently Chief Strategist for Research Collaboration at **North Carolina State University**, focused on his previous work at the **Harvard-Smithsonian Center for Astrophysics**. He discussed the importance of integration between author identifiers and the places where researchers work and publish, promoting the use of existing research communities as places to make the case for usage of author identifiers.

Sloane, User Services Librarian for Basic and Applied Sciences at **Middle Tennessee State University**, helped guide and moderate the talk, and discussed author identifiers in the context of a comprehensive university where the teaching load is heavier than the publishing load. She talked about researcher integration across platforms as one way to demonstrate the value of author identifiers to researchers.

The Big Picture: A Holistic Viewpoint of E-book Acquisitions —

Presented by **Maria Kennedy** (Loyola Marymount University); **Ron Lewis** (Loyola Marymount University)

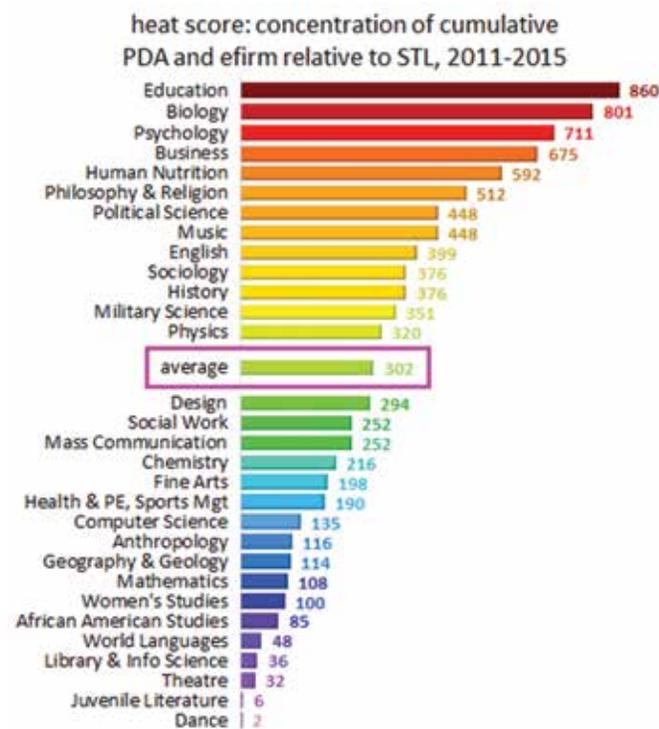
Reported by: **Kelly M. Robinson** (Embry-Riddle Aeronautical University) <rrobins2@erau.edu>

Lewis (Acquisitions Librarian) and **Kennedy** (Serials & E-Resources Librarian) presented research on the use of process maps for visualizing the eBook acquisitions workflow and described the creation of their own process map, now used at the **William H. Hannon Library at Loyola Marymount University (LMU)**. After a review of the literature, **Lewis** and **Kennedy** based their process map on the model by **Beisler** and **Kurt** (2012). During their initial planning process, individual process maps were created for the four primary modes of eBook acquisitions at **LMU**, including through the primary acquisitions vendor, **GOBI**, through databases, through Demand Driven Acquisitions, and through individual vendors. The maps were then merged to create a holistic "meta-map" of eBook acquisitions. This process allowed for better clarity and alignment of procedures, leading to smarter workflow in eBook acquisitions. Detailed procedures associated with the eBook acquisitions workflow were then added to their staff wiki. Session attendees were each provided a color copy of the map and key to follow along with during the presentation. The map may be found online: http://digitalcommons.lmu.edu/librarian_pubs/32/.

continued on page 78

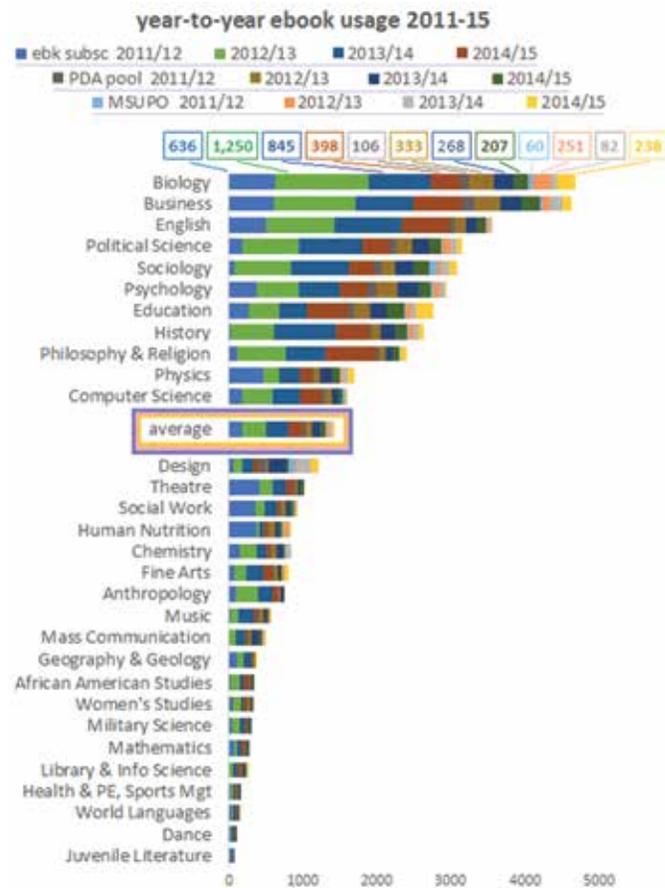
Determining disciplines most inclined toward eBook purchase: The **composite heat score for purchase inclination** was calculated by the equation of $x=(y1+y2+y3)*(z1+z2+z3)$, where x =composite heat score, $y1$ =number of years with STL activity, $y2$ =years with PDA activity, $y3$ =years with efirm activity, $z1$ =STL heat score, $z2$ =PDA heat score, and $z3$ =efirm feeder heat score. Each discipline's active years were calculated by the sum of years with STL, DDA, and efirm activity. Feeder heat scores for the expenditure types of STL, DDA, and efirm were calculated by subtracting actual rank in each expenditure type from the number 31. Rank 1 thus becomes heat score 30; zero activity during the four-year period was assigned rank 31 (thus a heat score of zero) in order to differentiate zero-activity disciplines from the lowest but above-zero-activity disciplines by multiplying the sum of each discipline's by the sum of their respective STL, DDA and efirm heat scores.

The strongest purchasers, as opposed to STL grazers, were (1) Education, (2) Biology, (3) Psychology, (4) Business, and (5) Human Nutrition.



eBook Usage, 2011-2015: Deep Dive by Discipline and Purchase Type

The chart below shows year-to-year eBook usage by discipline and type of eBook collection purchase within each discipline. The top users of all eBooks were (1) Biology (also the top eBook purchaser), followed closely by (2) Business (in 5th place as eBook purchaser), (3) English (placed 15th among eBook purchasers), (4) Political Science (3rd-ranking eBook purchaser), and (5) Sociology (in 7th place among eBook purchasers).



Intensity of Use: Pageviews by Discipline

Looking deeper than the surface measure of total eBook use, pageviews illuminate each discipline's intensity of use. The top five disciplines by **total pageviews encompassing all eBook types** from 2011 to 2015 are (1) Business (75,598 total pageviews), (2) Biology (66,916), (3) Sociology (54,451), (4) History (49,903), and (5) Education (48,732).

continued on page 79

Cutting the Cord: Learning to Live Without Comprehensive Journal Packages — Presented by **David Hellman**
(San Francisco State University)

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

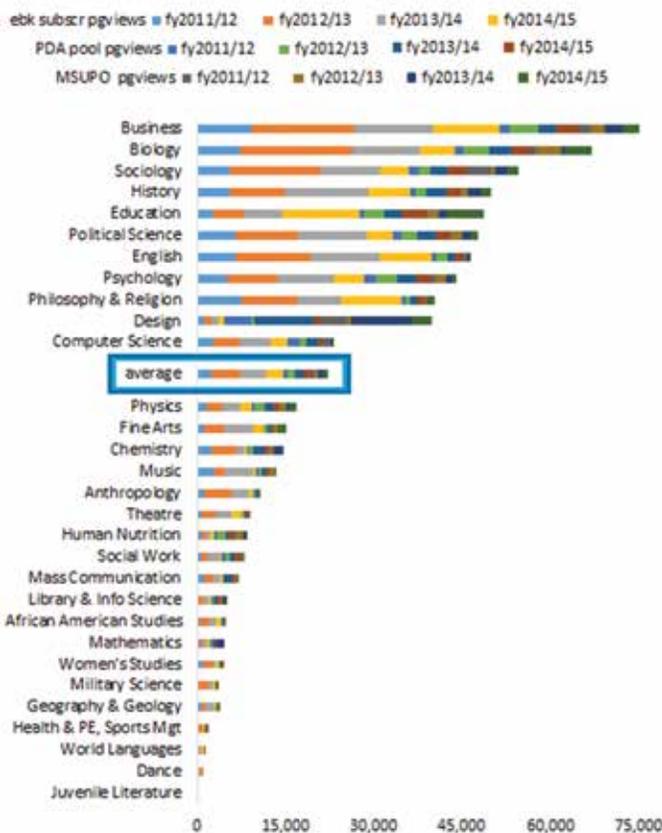
Hellman (also is an Associate University Librarian) explained that his library is a mid- to large-sized library with well over a million

volumes. He said he was talking in this program about ending a relationship with a particular journal publisher for their "big deal offering" and that he did want to keep the publisher's name anonymous. He also noted that he had no particular vendetta with the publisher, but the issues were what he called "systemic," and not unique to this publisher. He talked about why libraries initially jumped on board with the "big deal"; mainly because we saw them doing something great for us, by eliminating the print journal, and at the time that held a very big appeal for libraries. Also, the ubiquitous nature of e-journal access and good usage were things that were heralded. But later, as prices rose, libraries felt trapped by the big deal.

SFSU had the majority of its big deals managed by the CFS office and the particular package under discussion, which had about 1400 titles, had a number of problems and was overly complicated and time

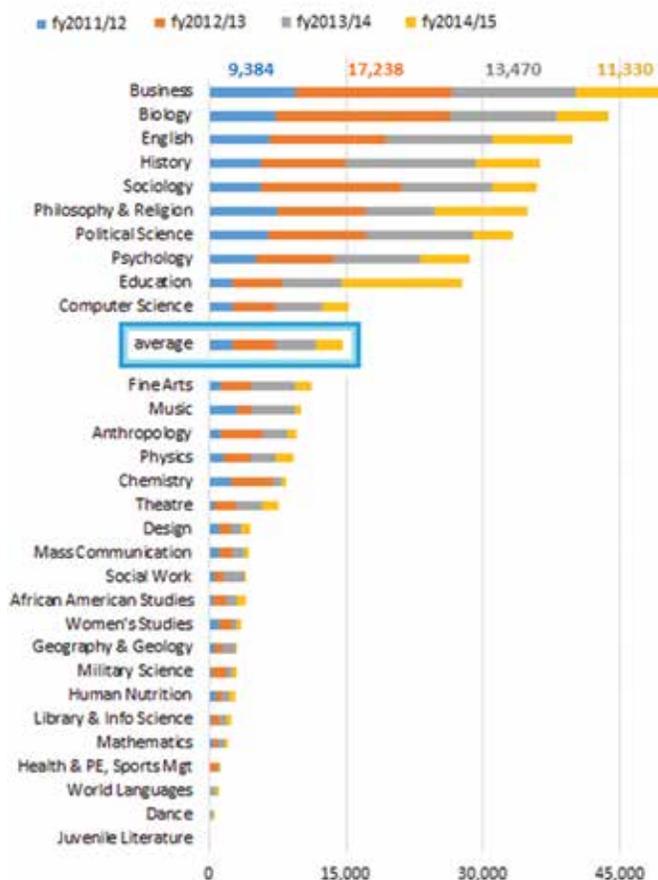
continued on page 79

Pageviews: all ebook types, 2011-2015



The top five **subscription eBook pageviews** occurred in (1) Business, (2) Biology, (3) English, (4) History, and (5) Sociology.

Pageviews subscr.ebooks, 2011-2015



The top five **pageviews** in the **PDA pool** occurred in (1) Design, (2) Business, (3) Biology, (4) Education, and (5) Psychology.

continued on page 80

And They Were There
from page 78

consuming, when renewal time came in 2014. **SFSU** did its own deal with the publisher. **Hellman** explained that libraries needed to think about “cutting the cord” of the big journal deals and to give themselves time to think things over. He understood that discovery services had created the way for our users to get quick access and they were concerned with the impact on users. They considered the good things going for them, that their library did have access to purchased back files, and they decided, after discussions between liaisons and faculty, to cut the entire package under discussion. They made a lot of use of their counter reports, current and archival, and looked at a lot of overlap reports from all of their databases. After their analysis, they saw that the package in question was significantly more expensive on a cost per use basis than other publishers. They did not use impact factor. “If a journal is not used, regardless of impact factor, it is not used.” Many of the titles were duplicated in aggregated databases, but there were still embargoes for some of these titles.

Once the decision was made, they needed to begin informing their stakeholders, “even if they refuse to listen.” The library at **SFSU** created a template for library liaisons to distribute to their faculty, based on the programs they worked with. They also put out a memo on their website and the **CSU Academic Senate** put out a resolution supporting the decision to end the package. The library made use of Get It Now, via their ILL office.

The response to cutting the cord? According to **Hellman**, very few complaints were made. He made some interesting suggestions, about creating a new model for peer review with a potential for social media. Also, he suggested that we should be taking back ownership over our scholarship and educating faculty on their copyrights.

Do We Approve? New Models for Assessing Approval Plans —
Presented by **Daniel Dollar** (Yale University Library);
Julie Linden (Yale University Library); **Sarah Tudesco**
(Yale University Library)

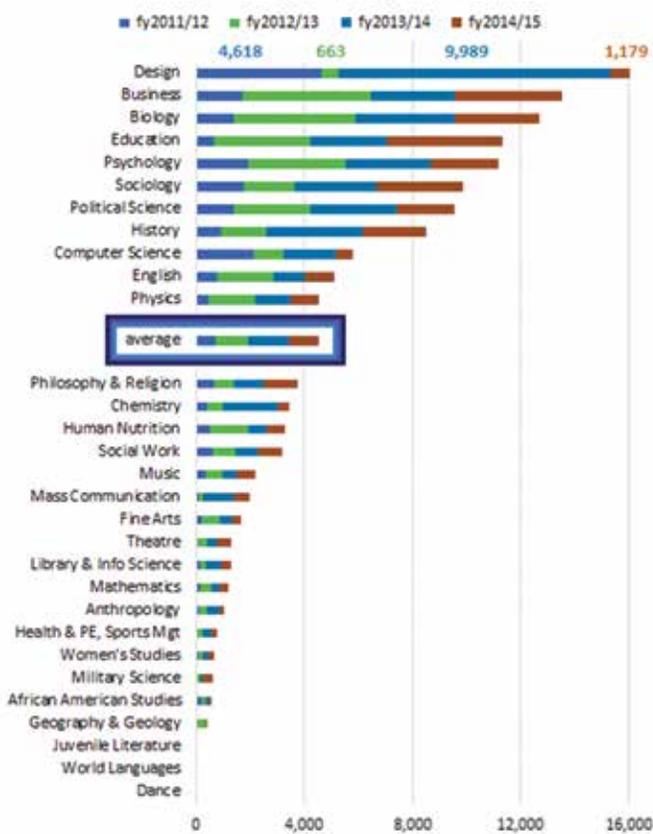
NOTE: Julie Linden and Sarah Tudesco did not present in this session.

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

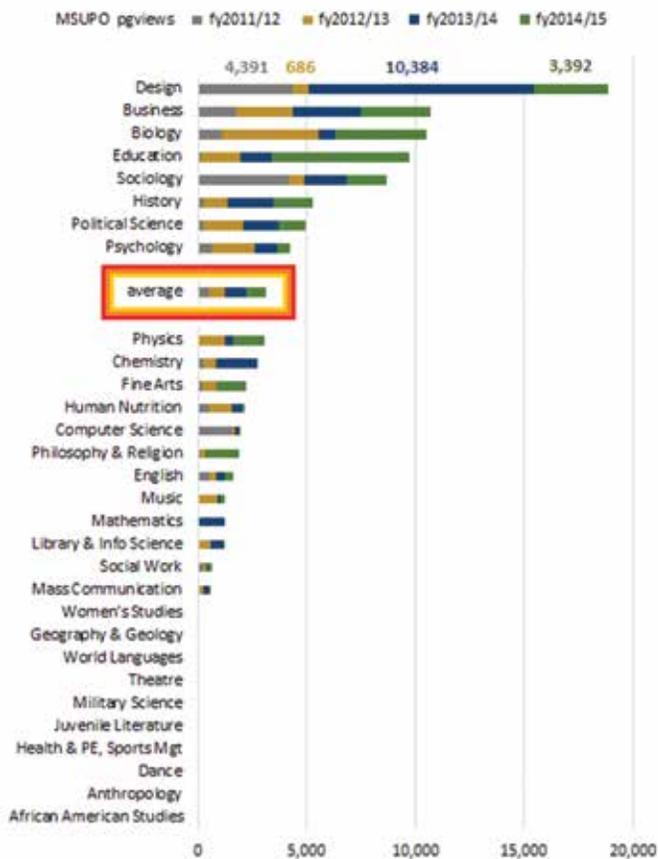
Dollar was the sole presenter at this session, which discussed a collaboration between himself, **Linden**, and **Tudesco** to assess **Yale’s** approval plan purchases. **Yale’s** multi-million dollar monographs budget is spent primarily via approval plans. The library’s monographs usage has been dropping, both for approval plan titles and for firm orders. Circulation among graduate students fell much less than for other users. Circulation rates were much higher for medical titles. The medical titles are mostly electronic and are not purchased by approval plans, which

continued on page 80

Pageviews: PDA pool, 2011-2015



Pageviews: owned ebooks, 2011-2015



The Spiky World of Usage Depth: Pageviews per Title Used, by eBook Collection Type

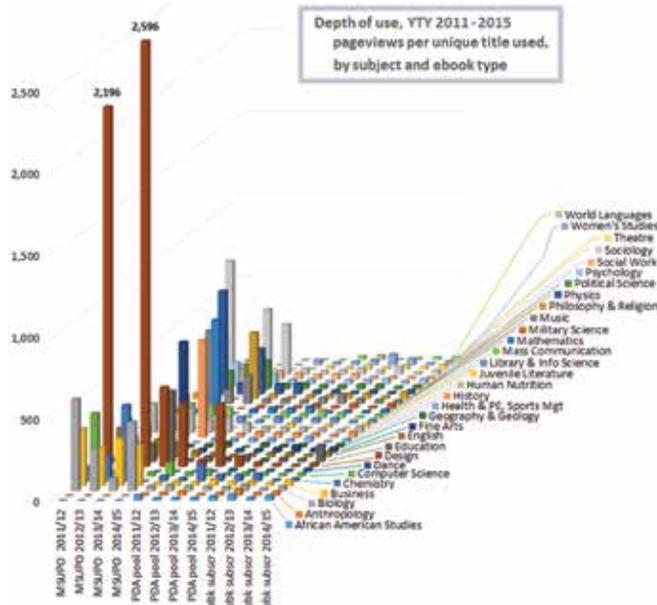
The above section's pageviews are skewed by the large size of the eBook subscription collection compared to the smaller PDA pool and even smaller collection of perpetually owned eBooks. The chart below therefore showcases year-to-year pageviews per unique title used by each discipline during each year. The perpetually owned eBook titles (shown as MSUPO in the chart) were used in most depth, and the highest use of all occurred in Design during 2011/12 at 2,196 pageviews per unique title used and in 2013/14 at 2,596 pageviews per unique title used.

And They Were There
from page 79

are focused on print titles. How approval plans meet local needs versus support ILL to other libraries will also need to be considered. Purchase requests are mostly in the humanities areas and are often for very new titles, including pre-publication requests.

Open Access and Open Data, Rolling with the Times: Case Studies of Librarians Helping Authors and Institutions Comply — Presented by **Darla Henderson** (Moderator, American Chemical Society); **Erja Kajosalu** (Massachusetts Institute of Technology); **Amy Hodge** (Stanford University Libraries); **Mira Waller** (North Carolina State University Libraries)

Reported by: **Stacy Stanislaw** (Library Communications Manager, Taylor & Francis Group)
<stacy.stanislaw@taylorandfrancis.com>



continued on page 81

continued on page 81

Toward Data-Informed Collection Decisions

Observations: In the four-year period from 2011/12 through 2014/15, print and eBook expenditures and usage evolved considerably. **Expenditures** are the highest for (1) Biology, (2) Education, (3) Political Science, (4) Psychology, and (5) Business. Conversely, the top five likeliest PDA or efirm-order purchasers are (1) Education, (2) Biology, (3) Psychology, (4) Business, and (5) Human Nutrition. **Usage varies:** The top five readers of *eBook titles overall* are (1) Biology, (2) Business, (3) English, (4) Political Science, and (5) Sociology. Actual intensity of use, as measured by pageviews, correlate with these programs' growing hybrid and online courses and graduate programs: The top page-viewers across *all eBook collections* are: (1) Business, (2) Biology, (3) Sociology, (4) History, and (5) Education. Conversely, the *PDA discovery pool's* top five page-viewers are (1) Design, (2) Business, (3) Biology, (4) Education, and (5) Psychology. In the *perpetually owned eBooks*, the most pageviews were observed in (1) Design, (2) Business, (3) Biology, (4) Education, and (5) Sociology.

Conclusions: Extensive and growing eBook usage varies between the subscription collection, PDA discovery pool, and perpetually owned titles. While the subscription collection's wide use across all topics reflects the broad range of eBooks contained therein, the PDA discovery and perpetually owned titles' heaviest usage by Design reflects that these PDA-centered collections supply the bulk of the technical coverage for building materials & codes, construction, computer graphics and design software. These titles also meet the needs of Design students with extensive studio obligations and graduate students who work. These areas' high usage rates in Business, Biology, Education, Sociology, History, and Psychology reflect an effective PDA profile delivering relevant titles which are used extensively and repeatedly by graduate students and working adults taking hybrid and online courses.

Implications for future research: These findings of all three parts of this study have raised both philosophical and practical implications. The data gleaned from this study inform individual work with academic departments' library liaisons by area, refining allocation formulas, and monitoring the effectiveness of the PDA eBook profile. Library decisions on selection, weeding, and retention by subject area are also supported by the print observations reported in this study's previous two articles. **Working with academic departments:** As hardcopy ordering has declined in several disciplines (as evidenced in this study's previous articles), department-specific tracking of each discipline's yearly usage and expenditure data and trends for print and eBooks will inform individual conversations with library liaisons and their in-library coun-

terparts for future-oriented strategies. Further goals include ingesting student-enrollment numbers and calculating print and eBook usage per student and faculty FTE, to further refine understanding of each area's usage behaviors. Rationale: Nuanced campus data, including overall program-enrollment trajectories, enrollment by course delivery (in-class, hybrid, fully online) within each program, demographic data (traditional full-time vs. working adults living off-campus enrolled part-time or online students), undergraduate and graduate enrollments, are typically gathered by campus assessment or institutional research offices. Such enrollment data illuminate library-materials purchase and usage data by providing decision-making context for anticipating future demand and further rebalancing print and e-allocations accordingly. **Refining allocation formulas:** Tracking usage trends will be enlisted in calculating appropriate print and eBook allocations for each discipline, in a manner sensitive to the data-evidenced reliance on particular formats and year-to-year changes in discipline-specific usage and expenditure patterns. Together with student enrollment and faculty FTE, these trends will be incorporated in the mathematical model designed to guide allocations. Especially for libraries with fixed or declining materials budgets, understanding of usage trends can help inform decisions on discipline-specific focused injection of limited funds into formats best suited to meet the respective areas' needs. **Library selection, weeding, retention decisions:** The usage data and trends also support decisions on print selection, weeding, and retention. For example, areas with declining hardcopy use in tandem with rising eBook use could become candidates for withdrawal of obsolete or replacing damaged materials with eBook editions. Conversely, areas with continually high print use signify continued need for current selection as well as more generous retention paired with gentler weeding approaches. So far, Winthrop's approach has refrained from injecting format preferences in the collection management policy (beyond the general principle of best fit for each discipline), so as to continue to provide philosophical guidance flexible enough to adapt to evolving needs. **PDA profile monitoring:** While the data of high pageviews in the PDA pool and perpetually owned collections suggest a highly effective PDA profile, year-to-year trends will be observed and selections adjusted as needed in order to maximize continued relevance. In addition to continuing to gather user input and feedback, data tracking the trends for the extent, concentration, intensity, and depth of eBook usage will be monitored for growing and shifting usage as indicators for profile-revamping needs. **Deeper trends analysis:** These findings warrant further analysis of relationships between enrollment trends for traditional and online courses by discipline, usage and expenditure data as observed in this study, evolving publication prices by discipline, formats, and user licenses, and formally ascertained user preferences. Together these data and their interpretation will enrich libraries' efforts to anticipate user needs and meaningfully allocate funds in support of these evolving needs. 🌱

And They Were There from page 80

The panelists discussed the roles they play in promoting and facilitating Open Access at their institutions. **Hodge** spoke about key challenges Stanford University has around open data and their institutional repository, namely that it can be difficult to add data and then get it out of the repository later on. In response, **Stanford** is exploring APIs that will allow for "easier flow of content and metadata both into and out of the repository." **Waller** spoke about two programs the **NCSU Libraries** launched to raise the research profile of their faculty: Summer of Open Science and the Research Data Committee. The goal of Summer of Open Science was to introduce the University to the core concepts of Open Science, while the Research Data Committee was developed to help position the library as a partner in the management and curation of research data across the entire campus. Lastly, **Kajosalo** spoke about **MIT's** newly combined collections and scholarly communications strategy, which "unites the aims of transforming communications for the digital age with innovation and sustainable development of **MIT** collections" and promote Open Access publishing and the **MIT** institutional repository. The session ended with questions from the audience.

Reimagining the Library: Relationships between Library Collections, Space, and Public Services — Presented by **Julia Gelfand** (University of California Irvine); **Charla Batey** (University of California, Irvine Libraries); **Theo Kemperman** (Bibliotheek Rotterdam)

Reported by: **Carin Graves** (Michigan State University)
<gravesca@msu.edu>

Gelfand started the session with some background and opening questions. These questions included: Should we save the stacks? What will the library of the future look like? What services will it provide? These questions centered the session around a concern for the use of space and place in the library.

Batey followed her colleague by introducing the changes underway at the **University of California Irvine Library**. Particularly interesting was the dedicated **UCI "Newsroom"** webpage that featured events and information about the libraries. **Batey** also shared some tips on maintaining a successful promotional campaign and open communication with the public.

continued on page 85

ATG Profiles Encouraged from page 84

agement landscape by providing an efficient administrative infrastructure to facilitate and coordinate the work of collaborative communities. Since Educopia's founding, we have maintained a neutral center that assists member institutions in our communities, empowering them to interact as peers instead of participating in a hierarchy of "lead institution" and partners. Educopia operates in an intentionally lean, nimble framework that privileges a decentralized model of member participation rather than storing up knowledge and infrastructure centrally.

ADDITIONAL ITEMS OF INTEREST TO ATG READERS: We help information stakeholders including researchers, archivists, curators, publishers, and students to establish common ground, work toward shared goals, and ultimately achieve system-wide transformations. We welcome inquiries from communities seeking assistance with a range of maturation challenges, including governance, organizational structures, revenue streams, policies and procedures, community engagement, assessment, and other essential components of sustained endeavors.

And They Were There from page 81

The session concluded with **Kempermen's** presentation on the work at the **Rotterdam Public Library**. **Kemperman** turned around a reduction in branches and expanded the library into nontraditional spaces. Additionally, with their unparalleled collection of **Erasmus** material, the library has worked to create an "Erasmus Experience" focused on helping inspire young adults to see themselves as "contemporary Erasmusses." The uses of space and place for services in both the **Rotterdam Public Library** and the **UCI Library** provides exciting examples of how the library of the future could look.

Shotgun Session: Collection Development Analysis and Assessment Thread — Presented by **Cris Ferguson** (Moderator, Murray State University); **Stephanie Hess** (Binghamton University Libraries); **Alison Bradley** (Davidson College); **Laura Schimming** (Icahn School of Medicine at Mount Sinai); **Kathleen Bauer** (Trinity College); **Rachel Winterling** (UNC Charlotte); **Zeb Evelhoch** (Central Washington University)

Presentations:

- Setting our "sites" on a tiered collection: One major health care system's rapid expansion (**Schwimming**)
- The Stratigraphy of subject liaison work: using data visualization as the bedrock for faculty-informed collection development (**Hess**)
- Create impact with data visualization (**Bauer**)
- Designing adaptable tools for in-house user studies (**Bradley, Winterling**)
- Adding and slashing serials (**Evelhoch**)

Reported by: **Becca Peters** (Metropolitan State University)
<Becca.peters@metrostate.edu>

This shotgun session had five presentations each lasting approximately 6 minutes and 40 seconds. The limited amount of time for each speaker seemed to produce concise and succinct reports. While all sessions centered on analysis and assessment of collections, the formats covered throughout the session varied from print monographs to eBooks, electronic journals, and popular print magazines. All of the presentations provided a broad overview of a project they had undertaken along with the process and tools that they used for their assessment. A common theme for several of the sessions was the need to move beyond the common tools that they use for analysis and assessment of their collections to make the data more useful to constituents outside of the library. One example of such a tool

Against the Grain / February 2017

is Tableau, a web-based data visualization software. Overall, the session provided useful tips and takeaways even with the fast paced delivery.

Understanding the Wider Impact of Scholarly Research with New Metrics — Presented by **Helen Josephine** (Stanford University); **William Gunn** (Mendeley); **Heather Coates** (Indiana University Purdue University - Indianapolis (IUPUI)); **Michael Taylor** (Digital Science)

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

The session covered quite a bit of ground before the session was over, not leaving much time for discussion or questions. **Gunn** very briefly characterized the nature of research. **Taylor** showed how the old model, scholar to publisher to library, was characterized by one type of content and distribution. Now, the flow over the internet between authors and readers goes in both directions. Citation-like "likes" appear in blogs and twitter comments, groups make pictures to characterize impact. **Coates** shared the **IUPUI** experience on model practices we want to see, the effect of impact on professional advancement, and the OA fund. **Josephine** discussed the **Stanford** experience where 30% of the students are in engineering, and described three recent challenging scenarios (where the library sought to help students): how to find out about funding, collaboration opportunities, and the advisory boards on which faculty serve. Libraries should model what they want to see (e.g., by acquiring and using ORCIDs in signature lines). **Taylor** returned to discuss the social contract and the scholarly network, using as examples Google where there seem to be 2 steps forward, 1 step back (with questions about privacy and ownership), contrasting with the open and collaborative scholarly behavior where current researchers support the work of future researchers. The Leiden Manifesto of 2015 (<http://www.leidenmanifesto.org/>) frames the conversation about data. Techniques should include openness, value, responsiveness, appropriateness, intent to education and informed. Closed proprietary metrics are not desirable.

We'll Do It Live! Building Access to Video Content Based on Freedoms of Use — Presented by **Allison Jai O'Dell** (University of Florida); **Trey Shelton** (University of Florida); **Aimee Barrett** (University of Florida); **Christine Fruin** (University of Florida)

NOTE: Allison Jai O'Dell was unable to attend the session as originally announced, but her content was presented by a colleague on the panel.

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

The presentation described a project at the **George A. Smathers Libraries** to provide public performance (PPR) and streaming rights notes in cataloging records for DVDs in response to questions that had arisen from faculty, students representing student organizations, university museums, and others on campus who were interested in showing films for events, exhibits, and in settings outside the classroom. **Fruin** gave a brief overview of copyright law and explained how media may be used in face-to-face instruction, and she discussed the language of the codes they developed. To give a sense of the expense of obtaining PPR when ordering videos for the collection, **Shelton** displayed charts that showed data about their expenditures. He explained that the expense of PPR confirmed the importance of sharing rights information to encourage use of the films. **Barrett** described the workflow from acquisition of DVDs and streaming video through cataloging. To support discovery, notes for the rights statements can be filtered in the catalog for the convenience of those searching for films that can be shown in settings other than the classroom. 🐼

That's all the reports we have room for in this issue. Watch for more reports from the 2016 Charleston Conference in upcoming issues of Against the Grain. — KS

<<http://www.against-the-grain.com>> 85