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And They Were There-Reports of Meetings

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And They Were There

Reports of Meetings — 36th Annual Charleston Conference

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 second installment of 2016 conference reports. The first installment can be found in **ATG v.29#1, February 2017**. We will continue to publish all of the reports received in upcoming print issues throughout the year. — RKK*

THURSDAY, NOVEMBER 3, 2016
LIVELY LUNCH DISCUSSIONS

Budgeting in an Academic Library — Presented by **Karin Wikoff** (Ithaca College)

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

Wikoff described her role as Head of Technical Services overseeing acquisitions, bindery, cataloging, eresources, serials, personnel and budget — without having had any formal budget training. After searching in vain for relevant courses, webinars, or workshops, she formed her own "Academic Library Budgeting Roadshow" to talk to peers and identify best practices, tips, and common ground through a ten question survey. She presented the questions that cover budget timelines, allocating funds to subject selectors, shifting funds, predicting serials costs, transitioning from print to online, end of year surplus funds, going over budget, PDA/DDA deposit accounts, zero-based budgeting, and the biggest budgeting challenges. Survey results showed a wide range of answers to each question, with many budget processes that are unique to each library.

Q&A followed, with audience members providing their own answers and experiences. Although there are no easy answers that can be shared across all institutions, the exchange of knowledge and practice is invaluable. **Wikoff** is continuing the project and will share ongoing results.

Creative, Evolving, Relevant - Communicating the Library's Value — Presented by **Thurston Miller** (Hesburgh Libraries-Chemistry-Physics Library); **Krystie Wilfong** (Columbia University); **Doug Way** (University of Wisconsin-Madison); **Natalie Butler** (Taylor & Francis)

Reported by: **Katherine Ahnberg** (University of South Florida) <keahnberg@usf.edu>

This session offered insight into the opportunities and challenges of developing, delivering, and maintaining programmatic outreach initiatives across a variety of campus stakeholders. Focusing on the mutual benefit attained from seeking out common-sense campus partnerships, potential groups identified were largely non-traditional, and included alumni networks and other non-academic units. The growing concept of student as customer continues to trend upwardly in libraries, manifesting here as a discussion of marketing techniques and other wide impact, "lean practices" geared towards communicating the relevance of library engagement for all campus stakeholders. The importance of tailoring programming to individual user interests was central to this session; suggestions for library led workshops based on student interests, discipline specific requirements, and primary language were one example of take home strategies for attendees. Creative approaches to maintaining targeted, effective outreach were offered, with an emphasis on intentionally designing an environment for meaningful student feedback and the responsive service practices necessary to meet evolving patron needs. Concluding with a discussion of the ways in which libraries can humanize the service element of our profession, this Lively Lunch opened the floor to participant experiences in communicating a library's relevance as a place that is "more than just books."

From Rivalry to Cooperation: Building Collaborative EBA — Presented by **Trey Shelton** (University of Florida); **Apryl Price** (Florida State University); **Stephanie Kaelin** (Cambridge University Press); **Jason Heckathorn** (University of Florida)

*NOTE: Joining the panel were **Aimee Barrett** (University of Florida); **Don Gallagher** (Cambridge University Press); **Charles McElroy** (Florida State University)*

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

The presenters defined Evidence Based Acquisition (EBA) as a way to make eBook purchases based on usage data with the final selection process done by librarians. Some of the benefits of EBA that they shared were that it utilizes collection development policies and librarian expertise. The costs are known up front as libraries choose the amount that they will spend, which provides a way to control eBook expenditures. The partnership between the two libraries and **Cambridge University Press** was initially an "experiment" that is now in its third year. The collaboration between the two libraries allows them greater access to content since they are "pooling their resources," which translates to approximately five times the amount of their deposit. The **Cambridge**

collection largely covers the humanities and social science, while still offering coverage for other subjects such as law, politics and business. The libraries did mention that a few downsides to this particular partnership are that it is only with one publisher and that they have to make purchasing decisions three times a year. Overall, the session provided a good example of what a successful collaboration with a publisher can look like, although it seemed more vendor driven, as many of the library panelists did not contribute content to the session.

Gender and Negotiation: Practices and Strategies — Presented by **Rachel Fleming-May** (University of Tennessee); **Jill Grogg** (LYRASIS)

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

Noting the sensitive subject matter, **Grogg** opened the Lively Lunch session with an overview of negotiation and background statistics, followed by the presentation of a set of ground rules to guide audience responses. The discussion was indeed lively among the approximately 25 attendees. Cultural norms and expectations regarding gender were mentioned, such as women are perceived to be cooperative, librarians are expected to be collegial and nice, which can affect behaviors and expectations when negotiating. Work culture (corporate vs. academic) and generational differences were also highlighted as factors that affect negotiation outcomes. Several experiences were also shared regarding negotiating for jobs and raises. Discussion continued to the point that **Fleming-May** ran out of time to go through all of the slides, but she did display the last slide, a resource list for further reading on the topic. Though somewhat light on solutions for dealing with gender issues, the session emphasized awareness that gender does matter and that it is one of many factors in how we negotiate. In a profession that is predominately female, understanding and discussing differences openly is important to understanding our negotiating partners and ourselves.

Giving and Taking: How We Each Contribute to the Scholarly and Scientific Journal Ecosystem — Presented by **Rick Anderson** (Moderator, University of Utah); **Ivy Anderson** (California Digital Library); **Erin Beutel** (College of Charleston); **June McDaniel** (College of Charleston); **Anirban Mahapatra** (American Chemical Society); **Matt Cooper** (Wiley Publishing)

*NOTE: **Erin Beutel** did not present in this session.*

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

Moderator **Anderson** (**Rick**) explained the speaker changes and shared the questions panelists would address: 1) What costs do I incur?; 2) What value do I bring to the ecosystem with the work that I do?; 3) Of things my fellow panelists do within our ecosystem, which are of the most value to me? **McDaniel** (who had to leave soon after her presentation to teach a class) presented a visual contrast of the "peaceable kingdom" and the "smoky swamp of ancient Egypt." Research overseas (for her — Bengal, India and Jakarta, Indonesia) presents religious studies scholars with challenges and benefits: no funds to pay for students to accompany her, but also — opportunities for interfaith dialog and meeting holy men. The smoky swamp metaphor described the stumbling blocks presented by politics, infighting, sacrifice (of people for departments), critical reviews of peers' books to show how "rigorous" a journal is ("Aztec sacrifice to the sun"). Colleagues can present "information roadblocks" because they (the authors) "haven't earned it yet." She advocated for "calls for papers" by theme that evens the playing field and reduces the randomness of publishing in her field. In her field,

publishers seem to prefer eBooks or hard cover books, while paperback books are still preferred for affordable, individual consumption. She discussed formal and informal (accidental) mentoring. **Anderson** (**Ivy**) discussed licensing: the institutional costs in the multi-campus world of **UC**, the value to the campus and the larger ecosystem. In the OA advocacy world, peer review doesn't get enough credit, and libraries are involved in managing journal integrity over time, as "the journal" in a field may change. **Cooper** discussed costs that aren't dollars, but rather: deadlines, travel, time, energy, turmoil. Value may be different with a small publisher vs. a large "service provider" publisher. Before innovation ("bells and whistles"), find a way to enhance research and enable content. An ecosystem without scholarship would mean that he would have no job. **Mahapatra** discussed the growth in journals since he joined **ACS**, the growth in global submissions (more editors and reviewers are needed in India and China, for example), the increasing interest in OA in chemistry. **ACS** will be launching a preprint server. His goal is to provide content, value and access, ensure that librarians can provide feedback on access.

How in Sync Are We? What Academic and Public Libraries Can Learn From Each Other — Presented by **Julia Gelfand** (University of California); **Anja Smit** (Utrecht University); **Theo Kemperman** (Bibliotheek Rotterdam); **Melanie Huggins** (Richland Library)

Reported by: **Amanda Stone** (South Carolina State Library) <astone@statelibrary.sc.gov>

Two public library directors and two academic library representatives exchanged ideas on how these two sectors are more alike than different in responding to community needs, and ways to collaborate and learn from each other. **Huggins** provided a snapshot view of the Libraries as Studio concept fostered at the **Richland Library**. Library spaces should evoke feelings and support; experience and how the space feels are critical. Spaces need to support the activities and outcomes desired. (Pop-up spaces included: library at the bar!)

Kemperman discussed interlibrary cooperation goals for **Bibliotheek Rotterdam**, the municipal public library. Goals include diversification of functions throughout the city, facilitating services to students of all types, drawing local users, lowering thresholds to use, and institutional cross-pollination. **Smit** considered advocacy and working with stakeholders valuable skills that academic institutions could learn from the public library sector. Regular leadership conversations between public and academic libraries in a community are important as well as possible collaboration with database vendor relations.

Gelfand rounded out the session with ideas on collaborations such as administrative cooperation, joint use facilities, borrowing cards, collaborative experiences, outreach for adult services, cocurating exhibitions, collaboration in special collections and local archive content, and partnering on social media and library instruction.

Liaison Librarians in the Know: Methods for Discovering Faculty Research and Teaching Needs — Presented by **Nora Wood** (University of South Florida); **Melanie Griffin** (University of South Florida)

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

This Lively Lunch was inspired by a 2014 session that asked what faculty wanted librarians to know. **Griffin** and **Wood** at the **University of South Florida** reported on a year-long project at the libraries to identify the research and teaching needs of their faculty. The analysis of faculty teaching needs centered around the analysis of syllabi pulled from the online course management system. The syllabi came from classes in high enrollment degrees and the general education requirements.

Research needs required more faculty involvement. Departmental websites were used to gain insight into research needs, but often had

missing or outdated information. To augment the data from departmental websites, the liaison librarians at **USF** interviewed select administrators in the College of Arts and Sciences.

Some preliminary insights include the focus on student success at the university, the increase in project based learning, and the shift towards online courses. Some suggestions **Griffin** and **Wood** draw from this are the need for librarians to get involved in campus wide initiatives and to incorporate the liaison librarian at the development phase of online courses. This session featured several breaks for discussion in small groups based on prompts provided by the presenters.

Really Open, or Really Shut Away? How Do Researchers Discover that Elusive Open Access Content? — Presented by **Byron Russell** (Moderator, Ingenta Connect); **Cesar Berrios-Otero** (F1000); **Eileen Lawrence** (Alexander Street Press); **Charles Watkinson** (University of Michigan); **David Sommer** (KUDOS)

*NOTE: Representing Alexander Street Press on the panel, **Andrew Eastman-Mullins** replaced **Eileen Lawrence**.*

Reported by: **Stacy Stanislaw** (Taylor & Francis Group)
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To start the session, **Russell** gave a short introduction to Open Access and shared his own experience with Open Access publishing and discovery of content. Next, each panelist took five minutes each to describe their companies and their involvement with and interest in Open Access. The panelists then answered a series of questions proposed by the moderator. Key questions included: "What will the OA Landscape look like in 20 years?"; "What steps can authors take to make articles accessible?"; "How can librarians build relationships with their patrons and help promote their work?" and "Can every university have their own publishing house that's driven by the library?" Overall, the panelists successfully examined the overarching theme of the session — what challenges does Open Access present and how can vendors and librarians help aid in the discovery of Open Access content.

What are Subject Liaisons When "Collections" and "Subjects" Don't Matter? — Presented by **Scott Warren** (Syracuse University); **Darby Orcutt** (North Carolina State University Libraries); **Mira Waller** (North Carolina State University Libraries)

Reported by: **Nicole A. Casner** (UCLA)
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The presenters discussed their work to understand the evolution of subject liaison roles in their institutions and how those changes might be reflected in library organizational structures. In addition to providing specific questions they have asked themselves and their colleagues on a local level, the presenters structured the session as a true dialogue with attendees. Most attendees agreed that their librarians and organizations are facing similar challenges to define roles, both in official job descriptions and practice. Much of the discussion focused on the different ways in which subject liaisons now go beyond traditional roles to reach out and meet students, researchers, and faculty members where they "live" beyond the library walls in order to connect them to resources that support, and oftentimes enhance, their work. Other examples of broader roles for subject librarians shared by the group included working with donors and applying for grants to expand services, redefining library spaces, and even full immersion into project teams centered within academic departments on campus. There was general consensus among the presenters and audience members that the roles, responsibilities and official definition of "subject liaison" would continue to evolve and that further discussions are necessary to fully explore the possibilities.

The Whole Discovery Enchilada: How Close Are We to the Goal? — Presented by **Janet Fisher** (Moderator, Publishers Communication Group); **Tricia Newell** (ACSESS); **Eddie Neuwirth** (ProQuest); **Kate Hill** (UNC-Greensboro); **Todd Carpenter** (NISO); **Ken Varnum** (University of Michigan Library)

Reported by: **Jharina Pascual** (University of California, Irvine)
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This session was a series of short presentations and then a discussion between different stakeholders in the process of discovery product development, purchasing, implementation, and maintenance. They weighed the current realities of discovery layer functionality and use, as well as the circumstances of various stakeholders that may lead them to engage with, adjust, or reject a discovery layer product altogether.

The discussion began with **Hill** of **UNC-Greensboro**, a librarian at a mid-tier academic institution. They do not purchase a discovery service. They use WorldCat Local for general research, and more advanced scholars use specific databases. They maintain their resources in Worldshare, which allows her immediate control over the metadata, link resolver, and any access issues. Their choices reflect a different budgeting and institutional reality than **Varnum's** at the **University of Michigan**, which makes use of many vendor-developed products through APIs as well as open access resources. Unlike **UNC-Greensboro**, the **University of Michigan** library system has the support required to troubleshoot, customize, and test various systems and their (often inaccurate) metadata.

Neuwirth from **Ex Libris** acknowledged that there are a lot of factors that influence the final product. These include the metadata schema used by in-house librarians, the licensing and technical requirements of publishers, as well as the feedback they receive from customers.

These contingencies, as well as the specific technical, procedural, and legal precedents set by the product vendors themselves lead to an environment where transparency and consistency are difficult and lead libraries and smaller publishers to seek avenues of search and distribution apart from discovery platforms. This is most likely to be Google Scholar. Unfortunately, as **Carpenter** argues, this is a service that lacks the metadata richness and specificity that libraries produce. It is also likely to be less transparent about how it produces and ranks results for searches.

In order for discovery platforms to become more competitive and useful to the library community in general, publishers and product vendors need greater commitment to implementing standards like KBART and other metadata schemata that allow for greater interoperability. They also need better user interfaces that make library platforms relevant to patrons — such as more seamless authentication, identification of open access resources, and more consistent metadata. 🐾

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*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**. Presentation material (PowerPoint slides, handouts) and taped session links from many of the 2016 sessions are available online. Visit the **Conference Website** at **www.charlestonlibraryconference.com**. — KS*