January 2019

And They Were There-Reports of Meetings

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Recommended Citation
Kubilius, Ramue K. (2019) 'And They Were There-Reports of Meetings,' Against the Grain: Vol. 29: Iss. 5, Article 27.
DOI: https://doi.org/10.7771/2380-176X.7855

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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 published 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 fifth installment of 2016 conference reports. The first four installments can be found in ATG v.29#1, February 2017, v.29#2, April 2017, v.29#3, June 2017, and v.29#4, September 2017. We will publish the remaining 2016 reports in the next issue and due to an inadvertent error, some remaining Thursday sessions will be included as well. Reports from the 2017 Charleston Conference will begin publishing in the February 2018 issue of ATG. — RKK

FRIDAY, NOVEMBER 4, 2016

AFTERNOON CONCURRENT SESSIONS

Shotgun Session: Management and Out of the Box Thinking/Entrepreneurship — Presented by Glenda Alvin (Moderator, Tennessee State University); Anita Day (University of Nevada); Robert Heaton (Utah State University); Gail Julian (Clemson University); Jacqueline Nash (University of the West Indies); Michael Rodriguez (University of Connecticut)

Presentations:
• Technical Services: Off-Campus and Lovin’ It (Julian)
• A R(eally) F(un) P(rocess) – Surviving an RFP (Day)
• Catching their Attention. Using non-formal information sources to captivate and motivate undergraduates during library sessions (Nash)
• Library Workflow Exchange: Because Your Library Already Answered the Question We Have (Heaton)
• The Noble Science of Naming Convention (Rodriguez)

Reported by: Glenda Alvin (Tennessee State University) <g_alvin@tennessee.edu>

The session consisted of five individual six minute and forty seconds presentations from librarians who had implemented innovative thinking and techniques to enhance services. Julian shared some of the pros and cons of her department’s move to an offsite location, which was illustrated by photos of the layout and furnishings. Day ran through the important points of putting together an effective RFP and provided lessons learned. Nash stressed the relevance of using students’ life experiences and “non-formal” sources to energize their interests in research and writing. She was followed by Heaton, who provided information on the Library Workflow Exchange, an online source created to store best practices and institutional processes and procedures. Rodriguez was the final speaker. He shared ways to have consistent naming conventions or nomenclature for library staff online and print archives, which include minutes, email, correspondence, price quotes and other documentation.

Boom and Bust: Short-Term Loans Five Years Later — Presented by Lea Currie (University of Kansas Libraries); Sherri Brown (University of Kansas Libraries)

NOTE: Currie was unable to attend or present at this session. Her contributions were incorporated in the presentation by Sherri Brown.

Reported by: Karna Younger (University of Kansas) <karna@ku.edu>

University of Kansas (KU) librarians argued that short-term loans (STL) are not a cost-saving measure for libraries after a dramatic rise in STL expenditures since 2011. KU re-assessed their STL and print demand-driven acquisitions (PDDA), electronic demand-driven acquisitions (eDDA), and eBook spending. Librarians faced the rising cost of and narrowing usage parameters of demand-driven acquisitions (DDA), and a decreasing collections budget. By 2014 STL prices increased from 5-10% of the book cost to as much as 30-35% of book cost. There was a 277% overall increase of cost of eBooks for KU. As a result, KU reduced the number of STLS from 3 to 2 before autopurchase, and converted their eBook approval plan items to DDA, preferring eDDA over pDDA. This has allowed KU to substantially reduce their total expenditures including eDDA STLS. Next steps include changing preferred eBook format for eDDA items; initiating the APEX program from YBP; turning off all publishers with STL costs higher than 35%; and establishing a shared eDDA program with a neighboring institution.

Content as a Community Asset: What Happens When It Loses Its Traditional Container? — Presented by Ronda Rowe (University of Texas at Austin); Ove Kahler (Brill); Tom Beyer (PubFactory); Wendy Queen (Project MUSE, The Johns Hopkins University Press)

Reported by: Julie Blake (Franklin University Nationwide Library) <jblake@franklin.edu>

We’re used to traditional units of information — journals, articles, books, chapters; those containers provide context for the enclosed information. What happens when those become less useful and new units are needed? How are those supported? What are the limitations? This panel addressed these issues.

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<http://www.against-the-grain.com>
Kahler noted that Brill is redesigning its website to support more content types and containers together due to confusion about the distinctions. Queen talked about working at the paragraph level, while juggling various publisher views. She also mentioned complications with synchronizing technology and linked data, though she noted that the vendor/brand may now be considered a container of sorts.

Some panelists mentioned challenging factors.

- Containers are partly for selling/marketing things. What happens when there’s no sale involved, as for open access items?
- The developer noted that he could make a platform geared toward any form of content, yet was somewhat constrained by a need to provide page numbers to support various citation styles, or customized links to materials that may include information from multiple sources.
- Ancillary materials, authentication, and indexing are still problematic.
- Librarians are used to buying by the container. It’s difficult to market and/or pay for interdisciplinary or multi-format options.

Horava outlined the context and issues surrounding APCs, and recent research. Funders seek transparent, competitive and reasonably priced APCs. Can consortia influence the APC market as they succeed do with traditional publishing? The session gave results of a 2015 survey of the 166 International Coalition of Library Consortia (ICOLC) members, regarding the goals, challenges, risks and opportunities for consortia to negotiate APC terms. Ward presented findings, full results being in the December 2016 issue of Serials Review (42(4): 280-92). From the 34 responses received (20% response rate), 30% had negotiated APC terms under any model. Overall, members had not

Horava pointed out the absence of precedents, the need for a well thought out strategy, and need for benchmarks of success.
subject specialists (in the library). Farrell described a university press vs library dichotomy: editors have ties with authors, while sales matters are tied to libraries. There are connection opportunities, for editorial curating (via a pilot project for a front list solution), or for connecting editorial expertise to libraries through sales. Misfires happen since deep networks may exist in domains and fields. User experience studies may help, as might connections to early career researchers. Audience participation abounded, including comments about how the market fails when it can’t support narrow scholarship, and that it can take a university press three years to clear costs. Usage (sales) are seen by editorial boards but are not transparent. In German speaking European countries, narrow fields can get funds for print subsidy.

The Nuts & Bolts of Supporting Change and Transformation for Research Librarians — Presented by Heidi Tebbe (North Carolina State University); Mira Waller (North Carolina State University Libraries)

Professional development is important and progressive at North Carolina State University Libraries as Tebbe and Waller capably demonstrated in their well-organized and information packed session. Programs at NCSU are expected to not only provide participants with the skills and tools necessary to meet the evolving needs of a 21st century research and scholarly community but also to place staff members in a position to be essential partners with research faculty across campus. To that end, NCSU Libraries have developed three excellent programs: a Data and Visualization Institute for Librarians, a Visualization Discussion series, and a Research Data Committee. The presenters skillfully and articulately shared each initiative’s early development, how the models evolved, and the challenges staff overcame to make the programs effective and efficient. Some of the biggest concerns of developers and planners were logistics, staff time, and sustainability. Equally important, the presenters speculated about future initiative opportunities and directions. They agreed that strategic networking and continued emphasis on visualization are crucial for future success. Overall, their biggest takeaway was that cooperation, flexibility, and an emphasis on quality rather than on quantity are essential for planning and maintaining staff development programs of this scale and complexity.

Open Access: Tackling the Issues of Organization within Libraries — Presented by Catherine Morse (University of Michigan); Sven Fund (Knowledge Unlatched)

Morse and Fund led a collaborative presentation on the landscape of OA publishing and its impact on libraries. Fund provided historical perspective on OA publishing and discussed the increasing conflict around resources of attention, money, and time between OA and non-OA publications. Fund also discussed the Knowledge Unlatched initiative and indicated a continued focus on the humanities and social sciences, with a future plan to include journals in the project.

Morse spoke on changes to the work of subject liaisons, who are often spending less time doing resource selection, due to approval plans, shelf-ready programs, discovery systems, and more. She asked the question, “How do we value what is free?” and pointed out that many traditional library workflows favor purchased content over free OA content. She suggested subject-based OA collections as one method to improve OA material implementation for subject librarians, making it easier for them to advocate for, market, and add OA materials to their collections.
This session was the very definition of innovation. Vickery presented his decision tree model designed to identify which titles in a DDA pool were likely to be purchased within the first 12 months of being added to a discovery layer. The goal of the model was to assist in DDA budget planning, but it also provided a deeper understanding of the collection and patron behavior. Vickery provided an informative “how to” session. His tools were simple: a knowledge base created from four years of the NCSU Libraries’ DDA purchase data and Syndetics summary descriptions, a SAS Enterprise Miner and Base SAS and Python scripts. His results successfully predicted 45 of the 556 purchased titles from a set of 9,769 titles. The greater success was predicting the titles that would not be purchased, correctly identifying the 8,972 non-purchased titles. One audience member question suggested a possible new analysis: running the same test on the same set, but build a new model using Library of Congress subject headings instead of the summary descriptions. Would the results be similar? Which type of metadata is more accurate — Syndetics or LC? Vickery’s presentation slides and programming scripts are available: go.ncsu.edu/dddmodel and github.com/jnvickery/DDAmodel.

Libraries and Publishers Working Together to Ensure Access and Limit Misuse — Presented by Julie Zhu (IEEE); Laura McNamara (Thomas Jefferson University); Aaron Wood (American Psychological Association); Paul Butler (Ball State University)

Reported by: Michael Rodriguez (University of Connecticut) <michael.a.rodriguez@uconn.edu>

This concurrent session featured two librarians and two publishers who focused on the need to safeguard library-subscribed electronic resources from so-called bad actors. Wood delivered a critique of Sci-Hub, a self-proclaimed “pirate website” that utilizes mostly stolen institutional login credentials to download PDFs from vendor platforms to redistribute those PDFs to Sci-Hub users. McNamara related tales of vendors contacting the library about breaches in which hundreds of articles were downloaded remotely via EZproxy. She also described instances of legitimate albeit suspicious-looking usage, such as when faculty members used the automatic download feature in EndNote. McNamara advised users to “be human” — not to automate PDF downloading and not to download more articles than they could reasonably read. Zhu addressed collaborations between publishers and libraries to improve both access and security. Butler stressed leveraging EZproxy and the EZproxy community. For example, librarians are able to share problem IP addresses on the <ezproxy@ls.suny.edu> listserv, creating a blacklist of hackers’ IPs that other libraries can preemptively block. One audience member also commented on the need to secure printers and other devices from hackers seeking to exploit vulnerabilities in campus networks. This session linked access and security in new and interesting ways.

Visit us at Table 82 at Charleston Conference Vendor Showcase to learn about The Complete Collection: 2nd Edition, or contact Elena Wayne, ewayne@docuseek2.com, 847-537-0606, to ask about specials through the end of 2017.

Libraries, Censorship and ‘Naked Lunch’ — Presented by William M. Hannay (Schiff, Hardin, LLP); Featuring Leala Grindstaff (College of Charleston)

Reported by: Julie Blake (Franklin University Nationwide Library) <julie.blake@franklin.edu>

This session was billed as “A presentation by Chicago attorney Hannay exploring the role that libraries have played — and continue to play — in resisting and enforcing censorship.” The discussion will include video excerpts of songs from the speaker’s recently-produced musical comedy, “Naked Lunch: The Musical” about the Burroughs’ novel’s obscenity trial.” Hannay presented a few facts and anecdotes, and the majority of the session was a presentation of four video scenes and one live scene (performed with Grindstaff) from his play.

Nobody Knows and Nobody is Responsible: Issues in eBooks Workflow and Access — Presented by Tina Adams (Western Carolina University); Paromita Biswas (Western Carolina University)

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

Adams and Biswas introduced their session by describing what they, in their roles as electronic resources librarian and metadata librarian, encountered along with the collection development librarian as they joined the staff at Hunter Library at about the same time. Workflows for processing eBook packages and firm orders were not clearly established, nor were they documented. The discussion centered on the eBook workflow project they implemented. The librarians developed...
a detailed flowchart to look for issues in processing, and they used that information in creating an eBooks checklist. With the tool Nintex Workflow for SharePoint, they created notifications and task assignments to implement the new workflow. In addition, they developed an eBook packages chart and took a retrospective look at licenses to document details about packages such as number of simultaneous users. They standardized language that users see in the catalog, so license terms are apparent. The project has benefits for both technical services and public services staff working with eBooks. A similar workflow is under consideration for databases.

**Shotgun Session: Digital Scholarship, Professional Development, and Scholarly Communication** — Presented by Rachel Fleming (Moderator, Appalachian State University); Tim Bucknell (University of North Carolina, Greensboro); Harriet Green (University of Illinois, Urbana-Champaign); Crystal Hampson (University of Saskatchewan); Hwee Ming Lim (Singapore Management University); Suzanne Cohen (Cornell University)

Presentations:
- Subject Selectors and Web Archiving at Cornell University Library (Cohen)
- Evolving the Team, Expanding Skills for the Future: SMU Libraries’ Skills Development for the Library Specialist (Lim)
- Towards Measuring Cost per Use of OA APCs Using Article Level Metrics (Hampson and Stregger)
- Humanities Collaborations and Research Practices: Investigating New Modes of Collaborative Humanities Scholarship (Green)
- Building Collaborative Library / Faculty Digital Projects (Bucknall)

NOTE: Elizabeth Stregger (University of Saskatchewan) co-presented with Crystal Hampson; Angela Courtney (Indiana University, Bloomington) co-presented with Harriet Green.

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

Comprised of five six-minute-and-forty-seconds “petcha kutcha” sessions, the theme of these lightning rounds centered on digital scholarship, scholarly communication, and organizational structure in libraries. Beginning the hour, Cohen presented on the collection development implications of web archiving at Cornell University in terms of History and memory, subject area content, and special collections archiving. Lim followed, detailing the reorganization of the SMU campus library and providing insight on the importance of fostering team dynamics, unlearning legacy practices, and breaking down departmental silos. Next, Hampson and Stregger advocated for the use of article level metrics to measure cost per use to support collection development decision-making and resource assessment. Project collaborators Green and Courtney followed with a presentation on the preliminary findings of a multi-institution research endeavor, Humanities Collaborations and Research Practices (HCRP), discussing trends in project management, data curation, and research practices in digital scholarship. Tips for successful competitive grant writing closed the session, with Bucknell providing insight into the pilot year of the Digital Partners grant program at UNCG and the challenges associated with long term hosting of digital projects.

**A Tale of Two Campuses: Open Educational Resources in Florida and California Academic Institutions** — Presented by Alejandra Nann (University of San Diego); Julia Hess (University of San Diego); John Raible (University of Central Florida); Sarah Norris (University of Central Florida)

Reported by: Ibironke Lawal (Virginia Commonwealth University) <ilawal@vcu.edu>

Textbook Affordability (TA) is an issue shared by many institutions across the nation. This session brings to the forefront, the different approaches, employed by institutions to combat the problem. The two institutions are examples of a small (University of San Diego) and very large institutions (University of Central Florida). The presenters discussed TA and Open Educational Resources (OER) as a component of it. Both states have legislations which are supposed to protect students from skyrocketing prices of college textbooks. Improvement to the California law has Community College Zero-Textbook-Cost-Degree Grant. As an incentive, University of San Diego awards a stipend of one thousand dollars to faculty who can find an alternative to a regular textbook for their courses. In another program, faculty gets $250 for a review of an open source textbook.
At the University of Central Florida, the library takes on a significant role. They form a working group with faculty and other stakeholders to find OER materials particularly for very large classes such as General Education courses. They also encourage faculty to use OpenStax books as well as library owned subscriptions. Both institutions make an effort to work in collaboration with the University bookstores rather than compete with them.

Evaluation shows significant cost savings for the students.

Charleston Premiers: Five Minute Previews of the New and Noteworthy — Presented by Trey Shelton (Moderator, University of Florida)

Participating Companies (in alphabetical order):

- AIP Publishing
- Bloomsbury
- Foios
- JSTOR
- McGraw Hill Education
- Project MUSE
- PSI Ltd.
- Overleaf
- Springer Nature
- Yewno

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

The session, held on Saturday mornings in the recent past, was no less informative (and fast-paced) in its new Friday afternoon time slot. Shelly Miller (Overleaf) overviewed the three markets served by the company’s products — users, publishers, and societies and the advantages of the cloud for serving institutions (for author programs), graduate schools, even IT Departments that support libraries. Colleen Hunter (Yewno) quoted the profound “What you know is a drop; what you don’t know is an ocean” as a way to describe Yewno. It mimics the brain, increases engagement, through nodes and lines, one can see relationships. It can be integrated into search tools. Justin Spence (PSI, Ltd) describes the endeavor of vetting IP addresses to clean up flawed information. Working with about 170 publishers and hundreds of libraries, and serving as a clearinghouse, PSI launched its beta registry site two weeks prior to the conference. Wendy Queen (Project MUSE) briefly reviewed the twenty year evolution (with Mellon Foundation and NEH grant support) to the present day, and the newest endeavor — a linked data environment pulling together Black Press in America resources. Michael DiSanto (Springer Nature) described the new product, Nano, an English language platform that pulls together nanoscience and nanotechnology information from many sources. Adam Chesler (AIP Publishing) described a new product, eSpectra: Surface Science Spectroscopy that is a journal of data, set to launch in 2017. It permits users to search, find, store, and upload their own data, and has the capabilities of plotting and comparing data. He invited business model comments. Kalle Covert (McGraw Hill Education) described DataVis, a new feature of the Access Engineering portfolio that became available in July 2016. It is now possible to see relationships between numbers and material properties (e.g., an airplane’s tensile strength), and there’s a related content widget. Valerie Yaw (Books at JSTOR) described the new open access book collection that features cross-searchability between chapters and JSTOR journals, and that can be added to libraries’ online catalogs. James Lingle (Bloomsbury Fashion Central) described Berg Fashion Library as a sister product to Fashion Photography Archive. It brings together eBooks and primary information resources on fashion. There are lesson plans and contextual commentary, and fair use (for images that Bloomsbury owns). Even if products weren’t relevant to attendees’ current professional realms, hearing about a potpourri of new products and features expanded everyone’s horizons. Moderator Shelton ended the session by giving thanks for the behind the scenes support needed for pulling together this session, everything from selection of vendors to present and the coaching of speakers. See also the conference blog report by Don Hawkins for more detail, including screen shots. 🎥

That’s all the reports we have room for in this issue. Watch for the final batch of reports from the 2016 Charleston Conference to appear in the next issue 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