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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 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 and Friday reports 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) <galvin@Tnstate.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) <julie.blake@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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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.

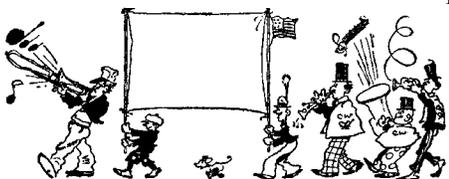
- Containers are partly for selling/marketing things. What happens when there's no sale involved, as for open access items?
- The developer noted that he could make a platform geared toward any form of content, yet was somewhat constrained by a need to provide page numbers to support various citation 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.

Library Consortia and Article Processing Charges: An International Survey — Presented by **Tony Horava** (University of Ottawa); **Monica Ward** (Canadian Research Knowledge Network)

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

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 successfully 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 created much pressure to focus on APCs. The main concerns specific to consortial negotiations included difficulty with communications due to many layers from consortia to authors; and difficulty incorporating APCs into the overall negotiations strategy, including getting a sense of the importance of APCs to members. A concern with skewing the market was also expressed, creating “free” publishing from one publisher and “not free” from another. The opportunity for consortia to obtain more favourable terms than individual libraries was also noted.

Horava pointed out the absence of precedents, the need for a well thought out strategy, and need for benchmarks of success.



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Cerebral Hemispheres of Scholarly Communication — Presented by **Jesse Koennecke** (Cornell University Library); **Boaz Nadav-Manes** (Brown University Library); **Emily Farrell** (DeGruyter); **Galadriel Chilton** (Ivy Plus libraries)

NOTE: Boaz Nadav-Manes served as convener and moderator. Terry Ehling (Project MUSE) joined the panel.

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

Nadav-Manes provided opening remarks about framing the topic of a much needed collaboration between press / library / publisher and addressed the many questions that can be asked going forward. **Koennecke** described various scenarios for funding (“getting to \$25,000”): crowd sourcing (e.g., **Knowledge Unlatched**), funding from the institution that forgives the debt (e.g., a fully funded university press, seen as part of the university mission, similar to the library), a new press consolidating funds (e.g., **Amherst College Press** that combines endowment funds for collections and money saved from subscription cancellations). Grants can fund experimentation, he pointed out. Per **Chilton**, the cerebral cortex is the source for differentiating conflicting thoughts (executive function) — “the good” (teaching, learning, global discoveries, series works, support of scholars), and “the bad” (determining costs of scholarly book publication, design, marketing, accounting). New knowledge can be created, involving faculty and libraries, by creating for credit apprenticeships, expanding learning, decreasing university press overhead while pulling in more (new) experience and encouraging partnerships. **Ehling** overviewed the reality of the university press world. In 2016, 22% (30) U.S. presses report to libraries. The work of acquisition editors is to cultivate networks, hold on to tenured faculty. University presses compete with small publishers. Using the corpus colossus analogy, **Ehling** indicated that libraries understand the institutional cohort, and university press acquisition editors can cultivate relationships with

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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 curation (e.g., a pilot project for a front list solution), or for connecting editorial expertise to libraries through sales. Misfirings 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)

Reported by: **Rob Tench** (Old Dominion University)
<ftench@odu.edu>

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)

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

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.

Rolling the Dice and Playing with Numbers: Statistical Realities and Responses — Presented by **Natasha Cooper** (Syracuse University); **Nancy Turner** (Temple University Libraries); **Michael Poulin** (Colgate University Libraries); **Kimberly Nolan** (State University of New York Upstate Medical University)

Reported by: **Kathleen Spring** (Linfield College, Nicholson Library) <kspring@linfield.edu>

Academic librarians often struggle with gathering collections-related statistics in support of external reporting requirements (e.g., **IPEDS**, **ARL**, **ACRL**). This panel discussed some of the challenges librarians face and offered suggestions for working through these difficulties. Librarians can easily spend an entire day trying to gather the data to answer a single question on a survey. Definitions are often convoluted and don't match up with the ways in which data can be easily retrieved or compared across institutions. Because of this, **Poulin** argued for vastly simplified definitions. **Nolan** stressed the importance of documenting local processes used to extract and massage data. Although **Nolan** advocated for libraries re-using statistics to communicate the value they bring to their communities, **Turner** was not as convinced this type of data actually demonstrates value. Maintaining consistency in definition of a metric over time can be difficult, making it hard to spot trends; beyond this, it can also be a challenge to identify metrics that will stay relevant over time. **Cooper** provided framing remarks for the session and moderated the robust question and answer period with the audience.

Changing How Monographs Are Acquired in Response to Evolving Needs — Presented by **Denise Koufogiannakis** (University of Alberta Libraries); **Trish Chatterley** (University of Alberta Libraries)

*NOTE: **Trish Chatterley** (University of Alberta) did not present.*

Reported by: **Elizabeth Pearson** (Ball State University Libraries) <epearson@bsu.edu>

In 2014, the **University of Alberta Libraries** moved from a distributed, slip-based selection model to an approval-only, e-preferred, PDA-led, centralized acquisitions model led by the Collections Strategies Unit.

The process of centralizing collection and acquisition activities was driven by factors such as staff reduction, budget cuts, and a change in preferred supplier for monographs. All individual selections were eliminated, all publisher front list purchases moved to e-preferred, and fund codes reduced to one approval and one firm order code per library. Approval profiles were adjusted to exclude publishers with front-list package agreements.

Despite the move to e-preferred collecting, it was noted that purchases remain primarily print, due to a commitment to honor requests from faculty for print materials. The average cost per title remains lowest for print, while DDA has the highest cost per title. The library system is attempting to negotiate discount plans for eBooks, to further close the gap in cost per title. Cost per use data has not yet been compiled or reported.

Impacts of the change include reduced or redirected spending, changes in staff and liaison roles, and stabilized library-vendor relationships. The impact on the collections will be determined at a later date.

DDA Management with Predictive Modeling — Presented by **John Vickery** (North Carolina State University)

Reported by: **Susan Martin** (University of Chicago)
<smartin28@uchicago.edu>

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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/ddamodel 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.

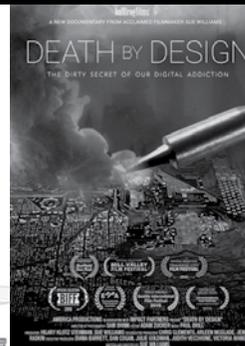
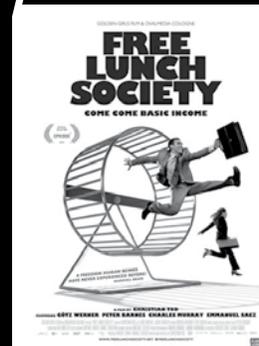
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Libraries, Censorship and ‘Naked Lunch’ — Presented by **William M. Hannay** (Schiff, Hardin, LLP); Featuring **Leala Grindstaff** (College of Charleston)

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) <cmfische@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

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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):

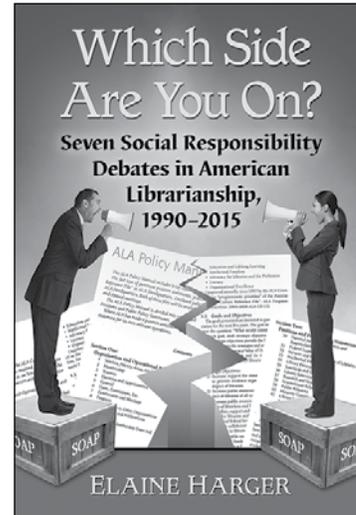
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- PSI Ltd.
- Overleaf
- Springer Nature
- Yewno

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. 🐼

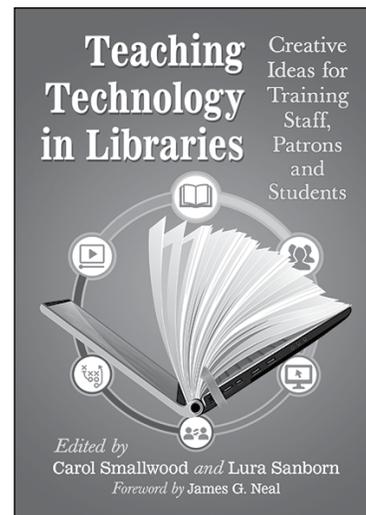
*That's all the reports we have room for in this issue. Watch for the final batch of reports from the 2016 Charleston Conference to appear in the next issue of **Against the Grain**. Presentation material (PowerPoint slides, handouts) and taped session links from many of the 2016 sessions are available online. Visit the **Conference Website** at www.charleston-conference.com. — KS*

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Elaine Harger

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