Against the Grain

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And They Were There- Reports of Meetings - 37th Annual Charleston Conference

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And They Were There

Reports of Meetings — 37th Annual Charleston Conference

Issues in Book and Serial Acquisition, “What’s Past is Prologue,” Charleston Gaillard Center, Francis Marion Hotel, Embassy Suites Historic Downtown, and Courtyard Marriott Historic District — Charleston, SC, November 6-10, 2017

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 **2017 Charleston Conference**. All attempts were made to provide a broad coverage of sessions, and notes are included in the reports to reflect changes that were not printed in the conference’s final program (though some may be reflected in the online schedule, where links can also be found to presentations’ PowerPoint slides and handouts). Please visit the conference site <http://www.charlestonlibraryconference.com/> to link to selected videos as well as interviews, and to blog reports, written by **Charleston Conference** blogger, **Donald Hawkins**. The **2017 Charleston Conference Proceedings** will be published in 2018, in partnership with **Purdue University Press**.

In this issue of **ATG** you will find the final installment of 2017 conference reports. The first four installments can be found in **ATG v.30#1, February 2018, v.30#2, April 2018, v.30#3, June 2018, and v.30#4, September 2018**. Watch for reports from the **2018 Charleston Conference** to begin publishing in the **February 2019** issue of **ATG**. — **RKK**

THURSDAY, NOVEMBER 9, 2017

(continued from previous installment)

CONCURRENT SESSIONS

Shotgun Session — Presented by **Rachel Fleming** (Moderator, University of Tennessee Chattanooga); **Lars Meyer** (Emory University); **Joe Payne** (The Ohio State University Health Sciences Library); **Kirsten Huhn** (Concordia University) and **Meredith Giffin** (Concordia University); **Robert Heaton** (Utah State University); **Jean Guden** (Medical University of South Carolina Libraries); **Pamela Bradigan** (The Ohio State University Health Sciences Library)

Presentations:

- 1) **Prelude to a Health Sciences Library Assessment: Introducing the Woodward Model** (Jean Guden)
- 2) **Creative Acquisition Practices for Funding Clinical Resources in an Academic Health Sciences Library** (Pamela Bradigan, Joe Payne)
- 3) **Shared Print Retention: Risks, Opportunities, Issues, and Challenges** (Lars Meyer)
- 4) **Library-vendor Relations in the Era of Bad News** (Robert Heaton)
- 5) **Ask and Ye Shall Receive: Using a Commercial Document Management Service for Book Storage and Retrieval** (Meredith Giffin, Kirsten Huhn)

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

Fleming moderated the session which swept through a variety of topics, some related. The first two speakers shared different perspectives on maintaining relevant health sciences collections that stay within their budgets and two others focused on storage solutions/document delivery. **Guden** described a model she is developing for the library, which can

and needs to grow, allowing it to strategize for a 3-5 year budget plan, enabling a fluid fund distribution. The Woodward Model includes core titles, takes into account the “three R’s” (recommendations, requests, and required resources), allows for non-data driven needs and emerging technology. **Payne**, presenting also on behalf of co-author **Bradigan** (who was present in the session), shared best practices when an academic health sciences library manages clinical resource licenses for a hospital. Lessons learned: start early with clinical leadership (since funding should be forthcoming from this source), as well as with customers. Look for vendor flexibility, explore multiple year license to lock in, thereby saving time. **Meyer** described a few collection-related aspects of his (**Emory**) library’s participation in two shared print programs: Scholars Trust and the HathiTrust Shared Print Program. Benefits include de-duplication, gap filling, collaboration and cooperative collection development. Among the concerns are the quality of bibliographic records, staffing and the non-participation of key libraries. The risks can be managed, he concluded. Later, in the last presentation, **Giffin** and **Huhn** shared the **Concordia University** (Montreal) experience with a commercial storage and document delivery management service, a solution to their university’s growth and renovation that came about after exploring other options, and how the library worked through the RFP process. In the second to last presentation, **Heaton** shared a practical list of considerations in library-vendor relations, e.g., knowing your limits and goals, identifying and gathering stakeholders, crafting a communications plan, being creative (and allowing others to be creative), agreeing to what is under discussion, keeping track of what happened, and follow-up/follow-through (holding parties accountable). The result? Mutual benefit.

Aligning Our Books to Our Patrons — Presented by **Glenn Johnson-Grau** (Loyola Marymount University); **Erika Johnson** (University of San Francisco); **Rice Majors** (Santa Clara University)

Reported by **Eric Parker** (Northwestern University, Pritzker School of Law) <ecp278@law.northwestern.edu>

In this concurrent session, **Johnson**, **Johnson-Grau**, and **Majors**, each representing a small, urban Jesuit institution in California, updated their presentation from 2016, titled “Assessing the Books We Didn’t Buy (The Sequel).” They provided additional insights gleaned from their continuing longitudinal study of borrowing, spending, and circulation data to define what a “normal” level of book borrowing is, as well as collection gaps.

One big change in the project is the departure from their consortium, Link+, of most **California State University** libraries, and their replacement by more public and community college libraries. This change has had impacted the overall collection available thru Link+. **Johnson-Grau** reported that **Loyola Marymount’s** unique holdings increased dramatically, from 114,000 to 188,000, in two years as a result of the consortium change. **Majors** reported that **Santa Clara’s** borrowing has decreased from 8,500/year to about 5,500 per year. He mentioned as well that, while he expected to see their circulation data improve in five to ten years as a result of purchases made because of the study, he has found that their circulation data has seen increases after only three years. So return on investment in books purchased thru this project has been significant.

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Cameo Role: Now Casting the Future of Film through the Library — Presented by **Tom Humphrey** (Kanopy); **Amanda Maple** (Pennsylvania State University)

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

Maple described **Pennsylvania State University's** tradition of distance education throughout its history and today's need for providing streaming video access to the land-grant institution's faculty and students. Offering those collections resources contributes to the university strategic plan's emphasis on online education and personalized learning. She shared budget context for online content and specifically streaming video. Graphs provided a snapshot of streaming content activity for several providers, activity by faculty and discipline, user device choices, and user discovery options all of which pointed to a growing reliance on streaming video in instruction. Taking a broader market overview, **Humphrey** discussed several surveys covering data on media preferences, the reasons students use video, and cost per use for library subscriptions and patron driven acquisitions (PDA). The role of the library has changed over time with collections of physical media now being replaced by streaming video, with much of the content accessed by students through consumer services. Libraries can stay relevant by offering quality content that has an impact for students.

Reviewing A&I Aggregators in a Large Research Library Collection — Presented by **Weijing Yuan** (University of Toronto Libraries); **Holly Inglis** (University of Toronto Libraries); **Cristina Sewerin** (University of Toronto Libraries)

Reported by **Colleen Lougen** (SUNY New Paltz)
<lougenc@newpaltz.edu>

The presenters all hailed from the **University of Toronto** which astoundingly has 44 libraries across 3 campuses. The presentation explored several important questions. What is the role of Abstracting and Indexing (A&I) and aggregator databases in the new information environment of Google, discovery systems, and extensive full text e-journal collections? How does a large research institution assess its substantial collections for duplicate indexing and full text coverage and identify low value databases? The presenters delivered practical details about their review project that could be easily adapted for any library: a methodology used to assess the value of a database; a discussion of challenges they faced; information about the tool that helped them identify overlapping full text and indexing; and finally, the outcomes of their review, including the databases they decided to cancel.

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Shotgun Session — Presented by **Ramune Kubilius** (Moderator, Northwestern University, Galter Health Sciences Library); **Edward Lener** (University Libraries, Virginia Tech); **Thomas Karel** (Franklin & Marshall College); **Whitney Kemble** (University of Toronto Scarborough); **Heidi Busch** (The University of Tennessee at Martin); **Bobby Hollandsworth** (Clemson University Libraries); **Carola Blackwood** (De Gruyter)

Presentations:

- 1) **It's NOT Just Kid's Stuff! (Reorganization of Juvenile Collection in an Academic Library)** (Heidi Busch)
- 2) **Technology Lending: Just Like Any Other Collection, Sort Of** (Bobby Hollandsworth)
- 3) **Collection Assessment: A Cure for Office Clutter?** (Thomas Karel)
- 4) **Cooking the Books: Developing an "Academic" Cookbook Collection** (Whitney Kemble)
- 5) **Hosting a Library Vendor Week: A Better Way to Manage Vendor Site Visits?** (Ed Lener, Carola Blackwood)

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

Kubilius moderated the session which provided varied views on collections (juvenile, cookbooks, and technology) in academic libraries, as well as the intersection of office and general collection assessment projects, and finally, the hosting of a fast-paced vendor (visit) week. **Busch** described a project to assess and update a juvenile collection, both on-site and off-site, that serves the Education Department, local educators, and the community. **Hollandsworth** described a rather impressive technology lending collection, and the related policies and procedures that needed to be devised. (The logistics sounded daunting to some attendees). **Karel** described the library's CAP (Collection Assessment Project), comparing and contrasting it with his own work office (backlog) triage project. **Kemble** described the library's aims to stay within budget limits, while building a niche, locally-relevant (particularly immigrant community) cookbook collection that benefits not only food science students, but also the university community as a whole. **Lener** (a librarian) and **Blackwood** (a participating vendor) described an interesting "speed dating" vendor visit week scheduled during a university's spring break that featured 27 vendors with products of potential interest to the library. When asked, **Lener** admitted that vendors did not cross paths during the scheduled meeting times.

Successful Strategies for Partnering for Student Success — Presented by **Michael Carmichael** (Moderator; SAGE); **Austina Jordan** (University of North Georgia); **Melissa Lockaby** (North Georgia University); **Todd Campbell** (University of North Georgia)

NOTE: Melissa Lockaby is affiliated with University of North Georgia.

Reported by **Robin Sabo** (Central Michigan University)
<sabo1r@cmich.edu>

The three presenters from **University of North Georgia** (two librarians and the Director of General University Studies) responded to three questions posed by the moderator — 1) How should the academic library define student success?; 2) Where do you feel the library is not clearly articulating how it contributes towards this success?; and 3) Where are the opportunities for effective collaboration between the library and other stakeholders?

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Librarians are encouraged to look for opportunities “to get out of the library” and to build relationships. The presenters referenced two recent reports that may be helpful to other academic libraries wrestling with these questions.

Ithaca S+R US Library Survey 2016 (April 2017), http://www.sr.ithaka.org/wp-content/uploads/2017/03/SR_Report_Library_Survey_2016_04032017.pdf

Association of College and Research Libraries, *Academic Library Impact on Student Learning and Success: Findings from Assessment in Action Team Projects* (April 2017), http://www.ala.org/acrl/sites/ala.org.acrl/files/content/issues/value/findings_y3.pdf

While this discussion offered many ideas to help academic libraries contribute to student success and better articulate their contributions, I was hoping for more concrete examples, such as a case study.

Transforming the Library/Vendor Relationship — Presented by **Barbara Kawecki** (GOBI Library Solutions from EBSCO); **Maggie Farrell** (UNLV); **Rick Branham** (SirsiDynix)

Reported by **Victoria Suslak** (EBSCO) <vsuslak@ebSCO.com>

This energetic session focused on the library/vendor relationship, and how both parties can and must work together to transform that commercial relationship into a true partnership to meet their shared goals. The presenters discussed how vendors can help provide economies of scale, as well as a broad view of trends, workflows and solutions from their experience working with many libraries. In addition, vendors can be a great source of information on job trends in the industry, consortial activities and networking. Partnering with vendors also provides libraries the opportunity to be on the cutting edge of new products and services. If a vendor is testing a new service, working with a library helps the vendor validate and develop the service, while the library benefits by having a valued role in that development and an early look at what's to come. The session ended with this: One of the reasons we all come to Charleston is to work together, and we must continue to work together because ultimately we all — libraries and vendors alike — have the same goal: to advance our libraries and our communities.

Charleston Premiers: Five Minute Previews of the New and Noteworthy — Presented by **Trey Shelton** (Moderator, University of Florida) and Representatives from: Bloomsbury Digital Resources, Casalini Libri, Code Ocean, Demco Software, EBSCO, Lean Library, ProQuest, The Institution of Engineering & Technology

NOTE: Springer Nature was added to the roster of vendors, replacing The Institution of Engineering & Technology.

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

Shelton once again moderated this fast paced session that showcased new and innovative products. Audience members may already have known about some of them — others, not so much. This year, the audience also was invited to vote on which of the products deserved awards in these categories: best design, most innovative, having the highest impact. While some products focused on organization and discovery tools, others offer actual new digital content. Describing **Lean Library**, **Johan Tilstra** (**Lean Library**) built on **Roger Schonfeld's** phrase (and 2015 Ithaka workshop title), “Dismantling the Stumbling Blocks: that Impede Researchers’ Access to E-Resources: An Ithaka S+R Workshop on Evidence-Based Decision-Making.” The product that already connects about 5,000 users to content was voted

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#2 in design and #1 in highest impact. **Michele Casalini (Casalini Libri)** described the new “from record to entity” BIBRAME into practice product from **Casalini Libri**. Linked data is behind Demco Software’s new product. **Ravi Singh (Demco Software)** highlighted a discover, connect, interact product that is enriched with local holdings (upload, search, optimize geo). It was voted #2 for highest impact. **James Lingle (Bloomsbury Digital Resources)** described new **Bloomsbury Digital Resources** collections (food, Arcadian, popular music) from the thirty-year-old company’s new one-year-old division. He reminded the audience that **Bloomsbury** was the original publisher of Harry Potter (celebrating an anniversary this year). **Travis Hewgley (Code Ocean)** told the audience about the **Cornell Technology** start-up, that allows one to find the code behind the data (currently 11 languages) in a cloud-based environment: reproduce, execute, suggest. In the audience poll, the product won #1 for best design and most innovative; #2 for most impact. Per **Tony Zanders (EBSCO)**, FOLIO can be used to manage all resources—it is physical, electronic format agnostic, for referential instead of copy cataloging, a foundation for extensible applications. **Barbara Olson (ProQuest)** described Early European Books (EEB) that encompasses 1450-1700, is from five European national libraries, and is an EEBO (Early English Books Online) predecessor. The availability of scatter maps, landscape and trends make things more visual. **Michael DiSanto (Springer Nature)** rounded out the session by describing Experiments, a site that features protocols (including current and previous versions), methods, and exchange, intelligent mining, filters for images, relevant citation trending, and the capability to communicate with authors.

Read also the report by **Charleston Conference** blogger, **Donald Hawkins**: <http://www.against-the-grain.com/2017/11/charleston-premiers-3/>.

FRIDAY, NOVEMBER 10, 2017
MORNING PLENARY SESSION

The Long Arm of the Law — Presented by **Ann Okerson** (Moderator, Center for Research Libraries); **William Hannay** (Schiff Hardin LLP); **Ruth Okediji** (Harvard Law School)

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

Okerson introduced the traditional and popular conference legal update session (the 8th!), which, because of the changed conference schedule, took place first thing on Friday morning. Session regular, **Hannay**, was joined this year by **Okediji** who proceeded first. Since she is an expert in and has an interest in copyright law, she focused on recent developments, desires, concerns, abuses, and alternatives. One of the more interesting cases described involved the derivative nature (or not) of changed words to the song, whose first print reference in 1909 was “We Will Overcome.” She finished with a brief discussion about artificial intelligence, where it might be a valid use, where not (hype vs reality, substitutive vs complementary and determine “automatable rules”). **Hannay** updated the audience on the “right to be forgotten” case from last year and moved on to recap a few cases of possible interest to libraries, including the cases in the European Court of Justice regarding the right to lend eBooks, and the legal debate circling around the ten-year-old company, **ReDigi**, that is being questioned on its rights to serve as a marketplace for previously owned digital products. To lighten up the session, **Hannay** again amused the audience with a song, with appropriately themed words flashed on a screen, this time featuring a refrain along the lines of “*You don’t own me....*”

Read also the session report by **Charleston Conference** blogger, **Donald Hawkins**: <http://www.against-the-grain.com/2017/11/the-long-arm-of-the-law-5/>.

FRIDAY, NOVEMBER 10, 2017
NEAPOLITAN SESSIONS

All about Predatory Publishing: Need for Librarians & Publishers to Better Inform Authors — Presented by **Charles Watkinson** (Moderator, University of Michigan); **Julia Gelfand** (University of California, Irvine); **John Sherer** (University of North Carolina Press, University of North Carolina); **Lisa Macklin** (Emory University); **Brigitte Burris** (University of Pennsylvania)

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

Gelfand introduced this session and was the session moderator (**Watkinson** later helped moderate questions). The concept of “predatory” was described as exploitive, requiring payment of funds without the (expected, accompanying) services, e.g., peer review. A timely October 30, 2017 *New York Times* article (by **Gina Kolata**), entitled: “Many Academics Are Eager to Publish in Worthless Journals,” was mentioned. **Burris** argued that authors don’t always understand the consequences when the curatorial function is limited or decreased. Open access is quick, but for certain journals, this type of publishing, is not a panacea, and critical thinking still must exist. **Macklin** talked about needed partnerships, relationships with journals (their editorial boards), education around the entire process, reputation building. It is more than just a judgement of “this is a bad journal.” **Sherer** joked about the address of **NCU Press** being on Boundary Street... There should be an improvement in the value proposition — increased services need to include increased capacity building. An office of scholarly publishing is not “vanity publishing.” Publishers are mission driven, provide non-traditional services (e.g., selling ebooks of free pdf books, publishing as a service, not cost recovery). Each project is a snowflake, he argued. There are over 100 university presses — work with them. Q&A was lively. The global scene is different. A complicating factor of being a “victim” of a predatory publisher? The shaming quality. Librarians could create a protective forum, OA publishing funds may be helpful. Who are predatory publishers? Those who see a way to make fast money in what is seen as a prestigious field (publishing), and start-up expenses are not high.

Read also the session report by **Charleston Conference** blogger, **Donald Hawkins**: <http://www.against-the-grain.com/2017/11/all-about-predatory-publishing/>.

FRIDAY, NOVEMBER 10, 2017
CLOSING SESSION AND LUNCHEON

Closing Session: End of Conference Poll-a-palooza Returns — Presented by **Erin Gallagher** (Reed College Library); **Nicole Ameduri** (Springer Nature)

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

The 2017 conference ended with a buffet lunch in the **Francis Marion’s** Gold Ballroom, and offered a satisfying, albeit breezy, review of conference-related and other topics with host **Gallagher** and her able assistant **Ameduri** (who roved the slippery floor with microphone in hand). This year, there was no co-host to offer an annual conference synopsis, but **Gallagher** provided a brief visit down memory lane to the three Poll-a-palooza sessions she had hosted to date, then began posing a series of questions for audience voting. What was a favorite type of

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session? (concurrent won out this year, again). Suggested changes to the conference were often humorous (e.g., no rain, midnight sessions), but also there were attempts to provide practical ideas (e.g., longer time slots for concurrent sessions, or, decrease the number of them, give umbrella titles to shotgun sessions, offer unconferences). Popular buzzwords? AI and more. Will IRs play a key role in the future of scholarly publication and research dissemination? More than half of the attendees voted “yes.” For variety, **Gallagher** jokingly added a question about the best books audience members had read (for her own reading list), and names of favorite Charleston restaurants (to check against her list of visited/to be visited). Were audience members mentored or served as conference mentors? About 1/3 responded “yes,” which gave clues about the composition of the audience in this year’s last session. Suggested themes for the 2018 conference ranged, from “Up the Down Staircase,” “Who’s on First,” “Tomorrow is Yesterday Before Today,” “Winning the Information Wars,” and more.

Intrepid **Charleston Conference** blogger, **Don Hawkins** reports more details, including more poll results through screen captures, in his blog entry about this final session: www.against-the-grain.com/2017/11/closing-session-conference-poll-a-palooza/. 🐼

Well this completes the reports we received from the 2017 Charleston Conference. Again we’d like to send a big thank you to all of the attendees who agreed to write short reports that high-light sessions they attended. Presentation material (PowerPoint slides, handouts) and taped session links from many of the 2017 sessions are available online. Visit the Conference Website at www.charlestonlibraryconference.com. — KS

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Publishing services provider Sheridan, a **CJK Group** company, has expanded its partnership with research technology company **Digital Science** to enable support for **Dimensions badges** and **Figshare supplemental data widgets** across the **PubFactory hosting platform**. Launched in January 2018, the **Dimensions badges** provide citation counts for any publication. Driven by the underlying technology of the **Dimensions platform**, which indexes over 96 million publications, users can click on the **Dimensions badges** to explore all of the citations a publication has received, with further detail on when they occurred and how the academic influence of the publication compares to other articles published in the same discipline. The **Figshare widgets** are a dynamic, embeddable integration that make it easy for publishers to provide the supplemental data relating to individual articles alongside the main text of the article, ensuring it is much more discoverable and encouraging reuse.

<https://www.digital-science.com/blog/news/sheridan-expands-pubfactory-partnership-with-digital-science/>

This seems cool to me. According to **The Bookseller**, a U.S. producer and former **Netflix** executive are embarking on a joint venture, “**TaleFlick**,” which offers a library of searchable books for adaptation across film, TV and digital media. Producer **Uri Singer** of **Passage Pictures** and **George Berry**, previously of **Netflix** and **Apple**, said the database “bridges the gap between the written word on paper and the spoken word on screen by paving the way for storytellers around the world to shop their content to the entertainment industry.” The platform is for all content including published books and short stories and the submission fee is \$88 (£67) to cover curation, which makes the content

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