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And They Were There-Reports of Meetings

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And They Were There

Reports of Meetings — NMLA 2017 and the 36th Annual Charleston Conference

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New Mexico Library Association Annual Meeting — *Lights, Camera, Action: Moving from Plan to Reality* —
November 1-3, 2017 — Albuquerque, NM

Reported by: **Mary Wise** (University of New Mexico,
Digital Humanities Librarian)

Gloria Steinem remarked in her 2015 book that hope is a form of planning.¹ Many information professionals find themselves hoping that they had better outreach programming, enhanced technologies, or robust archival programs but are unsure how to move from hoping to planning and from planning to implementation. Sessions at the **2017 Annual New Mexico Library Association** provided advice, workshops, and demonstrations about how to move from idea to reality. The sessions were particularly strong at this conference because presenters provided honest and effective advice about their own programming or their own experience.

The **2017 Annual New Mexico Library Association Conference** was held in Albuquerque, New Mexico at the Marriott Pyramid Hotel, November 1-3, 2017. The three-day conference gathered information professionals and cultural heritage workers from around the state of New Mexico and beyond. The conference officially began on Wednesday, November 1 with pre-conference workshops; these preconference workshops cost an additional \$25.00. Sessions continued from Wednesday at 9:00 a.m. through Friday at 3:00 p.m. Sessions were fifty minutes long and the eight hour day was broken up into five panels.

Pre-conference workshops reinforced that cultural heritage institutions and libraries cannot isolate themselves in siloes but instead need to meet their patrons and users where they currently virtually or really gather. Wednesday sessions provided attendees with models for developing early literacy programming, increasing your institution's broadband access, and reaching elderly patrons among other sessions. **Anna Daggett** and **Arminda Sandoval** from **Western New Mexico University Library** reviewed strategies libraries can use to meet patrons online. While many of the sessions at **NMLA** encouraged library and information science professionals to share their collections online, sessions on Wednesday reminded attendees that they need to be responsible when they share their collections online. **Susan Beck** of **New Mexico State University** and **Norice Lee** of **Burrell College of Osteopathic Medicine**, provided workshop attendees with library-specific scenarios and reviewed the tenets of copyright law in their session titled, "Caught in the Spotlight: Copyright Challenges & Trends in 21st Century Libraries."

One of the highlights of the pre-conference session was the poster session and welcome reception located in the exhibition hall. **Thomas Shumaker** from the New Mexico Commission of Public Records brought a dynamic poster that reviewed recent projects funded from the New Mexico Historical Records Advisory Board grant program. Many **NMLA** attendees stopped by this poster and learned more about the exciting grant program that offers a maximum of \$8,500 for digitization and preservation programs. At the Exhibition Hall, **NMLA** attendees could meet with vendors from all over the state, book publishers, and large book retailers among others. Typical of library conferences, there were many opportunities to gather free supplies and conference swag! The Digital Initiatives and Scholarly Communication Department from the **University of New Mexico** staffed their booth beginning on Wednesday evening and they eagerly discussed their current digital initiatives.

The **NMLA Annual Conference** began on Thursday, November 2. The day began incredibly early with special interest group meetings beginning at 7:45 a.m. At the Digital Collections Special Interest Group (SIG), members shared updates from their institutions. **Kevin**

Comerford from the **University of New Mexico** brought an Oculus Rift to the Digital Collections SIG and showed how members could use the system. Amongst a chorus of "oohs!" and "ahhhs!" members in the group suggested that a VR system like Google Earth VR might dramatically change the form of reference collections. While **Kevin's** avatar flew over the peaks of the Sandia mountains, one member of the Digital Collections SIG remarked, "This is like a virtual atlas!"

Peggy Cadigan, the keynote speaker, kicked off the conference by encouraging **NMLA** participants to rethink what it means to be innovative and by describing her current outreach efforts as the Deputy State Librarian for Innovation & Strategic Partnerships at the **New Jersey State Library**. **Cadigan** began her talk by making some comparisons between the two "New" states, New Jersey and New Mexico. The former has a fairly small territory and a large population, while the latter a large territory and a relatively small population. New Jersey has a very high population density, 1,218 persons per square mile, while New Mexico has 17. This certainly makes the challenges that the two states encounter in providing library service different. While there are other areas in which the two states differ, one thing, limited funding is a common element. **Cadigan** addressed a variety of very interesting ways that libraries can solve problems in innovative and creative ways. Some require money, like providing a restaurant or a kitchen in the library itself. Others require little funding, like re-purposing space. **Cadigan** described a very interesting program that the libraries in New Jersey have implemented, which can solve problems with few resources. The library creates SWAT teams of individuals with special talents who go to problem areas and re-envision the space to make it more welcoming and efficient. The before and after pictures were amazing, and they show the power of the outsiders' ability to look at a problem and present an elegant solution.

The mid-morning and early afternoon sessions on the first day of the **NMLA Conference** were particularly strong. While **Jennifer Brown** and **Cindy Tah** from the **Gallup NM Municipal Schools** reviewed strategies to engage at-risk youth based on their experience with low-income and vulnerable students, **Regina Bouley Sweeten** from **Eastern New Mexico University** provided an incredibly detailed and useful session on how to develop and maintain a digitization plan for university archives. The mid-morning sessions on the first day of the **NMLA Conference** reiterated that it is important for library and information science professionals to remain engaged and to think about users when they design and implement specific projects. **Kathy Bayer** from the **U.S. Government Publishing Office** gave a fascinating tour of **GPO** publications, which range from children's books, to the "Popcorn Handbook" and to the regular government publications we are all familiar with. The free flow of information is vital for a democratic society, and **GPO** is making great efforts to provide this information. **Bayer** highlighted some of the rich resources provided by **GPO** such as *USA.gov*, which she stated is the first place to start answering a reference question. Indeed one cannot only find **Ernest Hemingway's** FBI file, but also literary analysis of his short stories.

While most of the sessions from the pre-conference and the first half of day one of the **NMLA Conference** focused on users and patrons, sessions during the early afternoon of day one focused on the emotional impact of developing and launching these programs from within the library. **Heidi Greathouse** from **Eastern New Mexico University** focused on career advancement and professional development. **Dr. Michele A. L. Villagran** from the **University of North Texas** reviewed how bias can influence corporate culture and provided session attendees with strategies to combat unconscious bias and improve intercultural communication. We all have biases. Recognizing them and taking steps to remedy them is our responsibility. By reducing or eliminating bias

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we improve our workplace and our institutions by retaining top talent, building a diverse workforce, attracting and serving diverse customers, and building a diverse leadership culture.

The late afternoon session on day one of the conference questioned stereotypical versions of the library. **Kevin Comerford**, **Mary Wise**, and **Amy Winter** from the **University of New Mexico** asked session attendees what emergent technologies like virtual reality make possible for their institutions and demonstrated how to use basic, intermediate, and advanced VR systems. **Laura Metzler** and **Florence Sablan** from the **Public Library of Albuquerque and Bernalillo County**, challenged the idea that all library patrons must be literate and verbal by providing library and information science professionals with strategies to reach patrons on the autism spectrum. **Lea Briggs** and **Leah Boetger** from the **University of New Mexico (UNM)** drew on their extensive experience in designing and implementing a strategic plan. Unlike traditional top-down strategic plans, they described UNM's innovative strategic planning initiative "from the ground up." Extensive staff engagement at all levels created a meaningful strategic plan with extensive buy-in from staff.

The second day of the conference started with more early morning special interest group meetings and discussions at these various special interest groups reflected the dynamic role that libraries serve in their communities in New Mexico. For example, the Local and Regional History Special Interest Group sponsored two incredibly interesting sessions during the conference. The morning and midmorning sessions on day two of the conference encouraged reflection on the complexities of strategic planning and implementation. Any library professional who has ever overseen an innovative project has experienced some stress. **Leah Boetger** and **Anne Schultz** from the **University of New Mexico** provided session attendees with five strategies to improve emotional intelligence. Moving along the implementation process, sessions during the midmorning focused on marketing and evaluation of innovative programming. **Kathleen Dull** from the **Rio Rancho Public Library** encouraged library and information science professionals to develop a marketing plan. **Dull's** sessions focused on accomplishing marketing plans with limited financial resources. **Jackie Dean** a recently (September 30, 2017) retired elementary school librarian from Las Cruces, NM, gave a lively and entertaining session describing 10 activities that she always had at the ready for those occasions when teachers unexpect-

edly dropped off a group of students in the library. They ranged from answering questions about specific books based on the information on the cover (judge a book by its cover) to presenting banned books, tied up with a rope, and telling students that they are not allowed to check them out until the following Monday. **Dean** was also this recipient of **NMLA's Honorary Life Member Award**.

Late afternoon sessions at NMLA on Friday focused on the implementation phase of strategic planning. **Eric Beck** from the **University of Colorado, Boulder, Law Library** provided strategies for cultural heritage institutions and libraries looking to create digital projects with limited funding. **Sara M. Allison** from the **New Mexico State University** reviewed the vital role that student workers play in libraries and archives and encouraged faculty and staff who employ student workers to think through the value these students contribute to our institutions. **Pat Hodapp** from the **Santa Fe Public Library** reviewed how results-based accountability can strengthen statistics-based assessments. A team from **Albuquerque-Bernalillo County Public Library** system also presented a fantastic session on weeding and its necessities.

The exhibits area was also a busy place. Forty organizations including **Amigos Library Services**, **EBSCO**, **Barnes and Noble**, **Overdrive**, **Brainfuse**, **Scholastic Book Fairs**, **Gale**, **Ingram**, **Brodart**, **Recorded Books**, and many more displayed their products and services and sponsored the coffee breaks and Thursday lunch.

The **New Mexico Library Association 2017 Annual Conference** focused on strategic planning, preliminary implementation, and successful assessment. Sessions at this conference reviewed successes and failures, provided advice and warnings based on experience, and inspired libraries and cultural heritage institutions to rethink their roles in their community. Like any state Library Association meeting, it provided librarians from throughout the state the opportunity to meet, discuss common programs and find common solutions, and to network. There was at least one occurrence where a new library school graduate met not one but two potential future employers during the vendor-provided lunch session. Perfect weather, a first-rate conference venue at Albuquerque's Marriott Pyramid, with incredible views of the Sandia mountains, added to the very positive experience of this conference. 🐾

Endnotes

1. **Gloria Steinem**, *My Life on the Road*. (Random House Publishing: New York, 2015), xxii.

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 final installment of 2016 conference reports including some remaining Thursday and Friday reports* which were left out due to an inadvertent error. The first five installments can be found in **ATG v.29#1, February 2017**,

v.29#2, April 2017, v.29#3, June 2017, v.29#4, September 2017, and v.29#5, November 2017. Watch for reports from the **2017 Charleston Conference** to begin publishing in the **February 2018** issue of **ATG**. — **RKK**

SATURDAY, NOVEMBER 5, 2016 PLENARY SESSION

Long Arm of the Law — Presented by **Ann Okerson** (Moderator, Center for Research Libraries); **William M. Hannay** (Schiff, Hardin, LLP); **Mark Seeley** (Elsevier)

Reported by: **Ann Okerson** (Senior Advisor to CRL, Center for Research Libraries) <aokerson@gmail.com>

This year's seventh annual **Long Arm of the Law** plenary, organized by **Okerson**, brought forward two complementary legal perspectives.

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Seeley is General Counsel of **Elsevier**, a publisher under the umbrella of the corporation formerly known as **Reed Elsevier** and now branded **RELX** (pronounced “relics”). His brief was to describe the way a publisher’s lawyer thinks and works. **Seeley** emphasized that **Elsevier** is in flux, still publishing journals, still publishing books, but “increasingly our business is focusing on analytics and services.” The company recognizes that the world is awash in content and that content leaks out everywhere, but that there is sustained value in helping people figure out what to make of the content they use. He reminded the audience that **Elsevier** has a significant interest not only in medical publishing but also medical practice — and works as enthusiastically with practitioners as with researchers.

With 19 lawyers and 30 support staff, **Seeley** is responsible for a process that generates 400,000 journal article agreements per year and grants 100,000 permissions to use published material. The group also keeps an eye on longer-term issues, strategically framing their approach as asking of new initiatives and possibilities, “When can we say yes?” In practical terms, issues now include a welter of compliance concerns (a new UK anti-bribery law drove a complex round of due diligence), a continued focus on copyright and public policy (“We want to design our policies on re-use and scholarly sharing to support scholar-authors as much as possible”), the work of managing content (even OA material involves copyright issues), and other legislative challenges (a Text and Data Mining “right” in proposed EU legislation).

He outlined “a week in the life” with a dozen distracting foci, from consultations on copyright enforcement with the STM trade association and other publishers to discussions of technical capabilities for detecting content on non-publisher sites (which he described as a “shared problem with universities related to Sci-Hub”) to compliance, contract, and tax issues, to the sticky business of publication ethics (in one week, reviewing six proposed retraction notices with journal editors).

In the Q&A, he was asked when and how the publisher’s staff are encouraged to “talk to Legal” — **Seeley** smiled and said that “legal” is sometimes genuinely legal but almost as often the legal department is the corporate memory and is there to be consulted on questions of strategy and policy, more than strictly legal matters. To a question of how **Elsevier** thinks about Sci-Hub, he emphasized an interest in putting pressure on Sci-Hub and especially also LibGen (for books), asking where and how legal representation on the subject might be most effective, suggesting that neither Russia nor Kazakhstan seemed likely to be productive venues. He chose to emphasize collective work on accessibility and security, suggesting that it is time to get past the 90s-vintage security device of heavy reliance on IP addresses.

Hannay, who practices antitrust law with the firm of **Schiff Hardin** in Chicago and teaches at law schools there, followed with his eagerly awaited annual update on legal cases of important interest to libraries:

The right to be forgotten. This issue arose in the EU with a 2014 case of a plaintiff in Spain seeking and winning the right to have Google de-link to reports of the plaintiff’s earlier financial difficulties. The court found for the plaintiff (whose previous difficulties can still be found in some detail on various websites reached through a simple search), and Google has since handled more than half a million requests and complied with approximately 43% of them. A new EU regulation is coming in 2018, but it is anticipated not to change the situation materially. Night and day, the issue is not one with legs in the United States.

ADA and MOOCS. “No good deed goes unpublished,” **Hannay** said, in describing the catch-22 that **UC Berkeley** faces. Seeking to make its educational content more widely and freely available, **UCB** has disseminated substantial course content on the web, including audio and video material available via YouTube and iTunes. The Department of Justice has informed them that, though they have made a large quantity of material vastly more accessible than ever, they have not made it accessible enough because the plain audio and video files do not meet ADA requirements for accessibility by individuals with aural and visual handicaps. They suggest that **UCB** will have to modify its offerings and pay compensatory damages to aggrieved individuals. The case is open and unresolved, but has obvious implications for many academic information providers (e.g., institutional repositories) that seek to dis-

seminate content openly but do not budget the resources for multiple forms of format conversion.

Georgia State, the case that keeps on giving. This case too is still open, with **Georgia State** largely prevailing in its practice of making copyrighted material available via fair use as “e-reserves” for its courses. The case has bounced up and down between the trial court and the 11th federal circuit, with a provisional outcome strongly in favor of fair use and library practices, but much discomfort in the publishing and legal sectors still unresolved. A similar case has risen to the courts in India, where **Delhi University** was sued for large scale preparation of printed coursepacks from scanned and photocopied material without any rights payments, and a judge found entirely in the University’s favor. That case too is still entrained in the litigation process.

With the luminous clarity for which **Hannay** is justly famous among Charleston-goers, he concluded his remarks with a rap song (it is not true that **Katina Strauch** was heard muttering, “now I really have seen everything”) that went like this:

*With thanks and/or apologies to T-Pain
Here’s a little story that I got to tell
About three public-shers that done went through hell.
They started off a-suin’ ol’ Georgia State,
Hoping they could win before a magistrate.
They said the college has been actin’ criminally
By makin’ packets that are lookin’ too sim-larly.
Instead of buyin’ books or payin’ for our rights,
They’re rippin’ off the bread from our boys who write.

The school says, hey y’all, we just bein’ fair,
Usin’ up some words, a chapter here and there.
The judge says, yeah, I dig from where you came
’Cuz you are in the non-profit education game.
You didn’t use too much of what those authors say
And them publishers aren’t losin’ too much anyway.
So put it on reserve on a harddrive or a floppy;
You are good to go to take their books and copy.

[Hook x2]
Woah! Hooo! You copying me?
You-you-you-you copying me?
Woah! Hooo! You copying me?
You-you-you-you copying me?*

SATURDAY, NOVEMBER 5, 2016
NEAPOLITAN SESSIONS

A Gold Open Access World Viable for Research Universities?
— Presented by **Charles Watkinson** (Moderator, University of Michigan Library); **Carol Tenopir** (University of Tennessee, Knoxville); **Greg Tananbaum** (ScholarNext Consulting); **Ivy Anderson** (California Digital Library)

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

Tananbaum pointed out that Gold OA (in Europe) vs Green OA (in the U.S.) presents a global disconnect with cross-purposes, providing double dipping opportunities for publishers. **Anderson** provided rather startling “back of the envelope” estimates of what her library system would have to spend to make Gold OA happen. **Tenopir** shared the human side of OA, what surveys of faculty, graduate students, and post-docs have shown, with varying responses and a vast majority in the middle who don’t know much or don’t care. Respondents ranked highest: quality (journal reputation) to lowest: OA, with expressed feelings that OA will limit an author’s ability to publish. In the case of APCs, as most of **Tenopir’s** studies of other spheres often show, there is a difference across disciplines. The question and answer period was lively. **Anderson** indicated that libraries should target subscriptions where researchers actually publish, **Tenopir** shared that those with access to grant funds were more open to OA (the sciences, medicine), while graduate students like to think about quality, but publish where their faculty indicate they should.

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Update on Industry Trends and Issues — Presented by **Anthony Watkinson** (Moderator, CIBER Research); **Rick Anderson** (University of Utah); **Maria Bonn** (University of Illinois at Urbana-Champaign); **Gary Price** (infoDOCKET)

Reported by: **Christine Turner** (UMass Amherst)
<cturner@library.umass.edu>

Watkinson moderated a panel at which **Price** presented new text and multi-media resource, web archive, camera/image recognition and privacy protection tools. His list of resources is available at (<http://bit.ly/abplNchs>). **Anderson** and **Bonn** responded with their thoughts on the potential applications and usefulness of the tools. They had differing opinions on the roles of text tools such as BASE and OA DOI in library services. Multi-media search tools Audioser.ch, Pop-Up Archive and C-SPAN Library received praise from both for their utility, while **Bonn** cautioned about the importance of verifying the credibility and reliability and checking the terms of use of these sources. Camera and image recognition tools have the mixed blessing of ease of use and easy exposure of personal identity. This led to the final topic of discussion: tools to protect privacy. **Bonn** spoke to the benefits of building recommender services while cautioning about protecting patron data. **Anderson** noted that libraries should not make privacy decisions for patrons, and both noted the importance of informing library users of how their data is collected, protected and used, if it is.

SATURDAY, NOVEMBER 5, 2016
INNOVATION SESSION

Innovation Lightning Round 1: Collection Development: Analysis and Assessment, Digital Scholarship, and Scholarly Communication — Presented by **Bobby Hollandsworth** (Moderator, Clemson University Libraries); **Robert H. McDonald** (Indiana University); **Harriet Green** (University of Illinois); **Angela Courtney** (Indiana University); **Megan Kilb** (UNC-Chapel Hill); **Lisa Macklin** (Emory University); **Tessa Minchew** (North Carolina State University Libraries); **Melanie Kowalski** (Emory University Libraries); **Peter Rolla** (UC San Diego Library); **Virginia Martin** (Duke University Libraries)

Presentations:

- Time to Take New Measures: Developing a Cost-Per-Cited-Reference Metric for the Assessment of E-Journal Collections (**Martin, Kilb, Minchew**)
- Scholarly Needs for Text Analysis Resources: A User Assessment Study for the HathiTrust Research Center (**Green, Courtney**)
- Research Center as Distant Publisher: Publishing Non-Consumptive Compliant Open Data Worksets to Support New Modes of Inquiry (**McDonald**)
- Let the good times roll: A new model publishing contract for long-form digital scholarship (**Macklin, Kowalski**)
- Acquiring Born-Digital Items: Single PDFs (**Rolla**)

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

A newly re-packaged conference Saturday morning provided opportunities to hear in one room, in a fast, lightning round pace, about innovative projects and research findings from a number of speakers. In this collection development thread, **Martin** et al's study argued that CPR (Cost-Per-Cited-Reference) can complement the traditional CPU (Cost Per Use) metric studies of journal subscriptions and indeed may have saved a title for a few more years. (More information can be found in

their article published in *Serials Review* 42(4): 293-305, 2016). The next two reports came out of the **HathiTrust Research Center**. **Green** and **Courtney** reported that researchers need capabilities of re-use, metadata, and different units of (textual) analysis. **McDonald** described work sets for replication to build on, extracted work set downloads. **Macklin** and **Kowalski** described the changing business model and the high value placed on long form scholarship (books). The four page central model publishing contract, a collaborative endeavor, still going through draft version review, received funding from the **Mellon Foundation**, **Emory University**, and **University of Michigan**. It focuses on university presses, has utility for digital scholarship centers. **Rolla** described the "one off" pdf acquisition as provision of a specialized support for core fields or areas of excellence, such as those at his institution. Audience questions queried whether CPR might be a possible way to assess collections, as well as what is not owned, and questioned whether the model publishing contract can take into account worldwide distribution (presenters indicated that it does). See the conference blog report by **Don Hawkins** for more details and screen shots.

SATURDAY, NOVEMBER 5, 2016
CLOSING SESSION

Closing Session and Conference Poll-a-Palooza: Part 3 — Presented by **Erin Gallagher** (Rollins College); **David Warlock** (Outsell, Inc.)

NOTE: David Worlock was unable to attend the session and Jason Price (SCELC) stepped in.

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

What better way to conclude a conference? The 2016 conference no longer featured a Saturday late afternoon "Rump Session." So, **Gallagher**, from on stage, served as a "ringleader" for what was the true final conference event, what she called "Return of the Palooza." The lunchtime session featured food, lively audience participation, and plenty of humor from ringleader and audience alike. **Price**, a gracious last minute stand-in for **Warlock**, roved among the Gold Ballroom tables with mike in hand, providing input, until he had to depart for the airport. Using the Poll Everywhere software, audience members shared from where they came (the furthest — Uganda and Australia), whether they were first timers (52.7% at this session!), what they felt was the hottest buzzword at the 2016 conference (piracy, linked data, SciHub). They answered questions — about their libraries' support for OA, as well as opinions for questions such as whether libraries should make long-term preservation a priority, whether discovery should be left to Google, and the current stage of IR's. What will be the hottest topics for 2017? Audience members predicted: OA, "beyond the container," extinction / survival, and also: cat café as well as therapy dogs... Ideas for 2017 **Charleston Conference** themes? "Grab your data and go," "Open access, open minds," "Beautiful data," "Human vs machine." **Don Hawkins'** conference blog report provides more details about audience responses to various questions posed by **Gallagher**.

***THURSDAY, NOVEMBER 3, 2016**
AFTERNOON CONCURRENT SESSIONS

Achieving the Holy Grail of Electronic Resource Management with Automated Holdings Feeds — Presented by **Antje Mays** (Winthrop University); **Jozef Paulik** (Elsevier); **Jody Stroh** (OCLC)

Reported by: **Jharina Pascual** (University of California, Irvine)
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This session focused on the use of automatic holdings feeds via **OCLC** at **Winthrop**, thereby eliminating the time-consuming process

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of acquiring and maintaining vendor-produced MARC records as well as holdings loads from another knowledge base. An institution can contact OCLC to set up the service according to their specific collections that need population and updating. This process not only saves the institution time in implementation and maintenance, it also increases the accuracy of the catalog and therefore enhances discovery.

Paulik presented the vendor side of this process, detailing the current and future plans for the improvement of **Science Direct's** APIs, automation, and metadata availability and consistency. They are planning a second phase in implementing the KBART standard, which would try to account for differences in package descriptions and collections among vendors. **Elsevier** is also looking to improve reporting of holdings for account holders, as well as providing different serializations of the data. Beyond standards, they are also looking to improve APIs that interface directly with library systems, which would give libraries greater control over their collection information.

Assessing the Books We Didn't Buy (the sequel) — Presented by **Rice Majors** (Santa Clara University); **Erika Johnson** (University of San Francisco); **Glenn Johnson-Grau** (Loyola Marymount University)

Reported by: **Jharina Pascual** (University of California, Irvine)
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This session presented a multi-year assessment of print monograph collections via ordering and borrowing statistics at three small private universities that are part of the 65-member LINK+ consortium. Within a select call number range, they examined the circulation statistics of titles purchased over the last five years alongside LINK+ statistics to compare the level of successfully-met demands versus the unmet demand represented by ILL borrowing. In the first year's analysis, the **University of San Francisco's** collection seemed to perform better in meeting the actual demand of its students. **Santa Clara**, however, wanted to improve their statistics; this focused study assisted in identifying gaps to address. If there was a higher amount of ILL borrowing in certain subject ranges, they considered buying more titles even if local circulation of titles in these subject ranges were good. If the local collection did not have good circulation but there was still a lot of borrowing, they considered buying differently. In response to its relatively lower rate of met demand continuing into the second year, **Santa Clara** has considered investing more into collection development of books versus databases and journals.

The continuation of the study will focus on analysis of other call number ranges not only to gain a deeper understanding of the collection's strengths and weaknesses, but to encourage methods of increasing use and lending (such as purchasing unique items at the local level). Overall, the institutions are looking to see modest decreases in LINK+ as they are using this study to better calibrate their purchasing strategies.

Best practices for Building Data Collections — Presented by **Sara Bahnmaier** (University of Michigan); **Mara Blake** (University of Michigan); **Catherine Morse** (University of Michigan)

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

The panel provided a case study of a **University of Michigan** library "one time purchase" data grant program, now entering its second year, modeled after a similar program at **University of Illinois**. Acquiring data may not be easy for a variety of reasons: turnaround may drag on, there can be hosting issues, the requested data may not be pre-packaged. There are access issues, storage issues, size limitations, as well as questions about preservation, responsibility, and payment. The speakers contended that a program of acquiring data is worth it, but there are challenges. It

takes extra time. Sometimes the data patrons want doesn't exist or is not available for purchase. Vendors may not be used to working with libraries. Annoying things may happen. However, there are advantages for libraries. The program can address requests of researchers (though they don't always understand restrictions). It can provide a central location to prevent "rogue" licenses, can pull together disparate requests for the same data, and can save money overall.

The Librarian's Survival Guide to the "Big Deal": Tools for Unbundling — Presented by **Doug Lynch** (EBSCO Information Services); **Samuel Cassady** (Western University); **Alie Visser** (Western University); **Leanne Olson** (Western University)

NOTE: **Alie Visser** did not present in this session.

Reported by: **Christine Turner** (UMass Amherst)
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A devalued Canadian dollar and a high percentage of journal subscriptions paid in U.S. Dollars, forced **Western University** (London, Ontario) to cut their journal subscription costs. Despite high value and low cost/use of journal packages, their only option was to cancel some packages in favor of individual journal subscriptions. **Cassady** and **Olson** provided a comprehensive and detailed account of the methodology, criteria and tools applied to determine which packages to cancel and which titles to buy back. In addition to use, they also compiled overlap, faculty feedback and citation data, then applied a weighted formula to rank journals. **Lynch** covered the title list and pricing analysis data **Ebsco** contributed to the project. While necessary, the process was labor intensive and the results were not optimal for users, publishers or consortia participants.

Project Management Office to the Rescue: Aligning Workforce and Resources with Library Vision and Delivering Results — Presented by **John Wang** (University of Notre Dame); **Anastasia (Nastia) Guimaraes** (University of Notre Dame)

Reported by: **Nicole A. Casner** (UCLA)
<ncasner@library.ucla.edu>

Wang found an increasing amount of his department's goals would require dedicated project management skills and time in order to be achieved. However, job descriptions and daily work requirements did not specifically outline the responsibilities or support the work in practice. In order to properly align resources and more easily balance daily work and project tasks, the Project Management Office (PMO) was created. **Guimaraes**, a current member of the team, provided details about how team members were chosen, the way in which they gather, track, and communicate information about ongoing, completed, or postponed projects. The PMO created a charter, devised infrastructure and collaboration guidelines, defined "project" within their particular organizational context, and ensured proper approval channels. At the outset of each proposed project, PMO team members work with a requestor to fully understand the work needed and specific deadlines. Once a project is accepted and approved, tracking and identified tasks are divided between Project Managers, Product Owners, and Unit Managers and other colleagues until successful completion is achieved and reported out to stakeholders. The presenters stressed the importance of true collaboration not only between the PMO team members but with each colleague involved in a project.

Technological, Organizational, and Cultural Transformation of Technical Services and Collection Development — Presented by **Janetta Waterhouse** (West Virginia University)

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

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And They Were There
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West Virginia University Library hired a new Dean in 2014 and a consultant's report on technical services later that year led to the creation of the Director of Knowledge Access and Resource Management position. **Waterhouse** was hired and arrived to find staff ready and eager for change. A move from Voyager, Summon, Serials Solutions and various other systems to WMS led to very streamlined processes for managing holdings. The technical services department was centralized and restructured into four units: e-resources, data analysis, ordering and receiving, and metadata, the latter mostly working on projects. Staff changes were based on the individual's personal strengths. Staff had input into which unit they went to and were energized by the new structure. Culture shifted to empowerment with accountability. Workflows are flexible to adapt over time. Performance management was added. A standing Electronic Resources Committee was replaced with a Collection Advisory Committee, whose membership rotates. In transformational change, the exact destination is unknown. A loss of expertise occurs. It's important, therefore, to create short-term wins and focus on training and communication. Being very focused on getting things done can interfere with developing good relationships with staff. Empowerment should not occur before people have the skills.

Why We Blog — Presented by **Pat Sabosik** (ACI Information Group); **Chris Erdmann** (North Carolina State University); **Thomas Nadelhoffer** (College of Charleston); **W. William Woolsey** (The Citadel)

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

Wanting to explore blogging in academia, **Sabosik** assembled a panel of two teaching faculty members, associate professors **Nadelhoffer** and **Woolsey** and a librarian, **Erdmann** (formerly at the **Harvard-Smithsonian Center for Astrophysics**). **Nadelhoffer** and **Woolsey** shared their motivations for blogging and the challenges they have faced. Both started blogging for intellectual reasons. **Nadelhoffer**, who manages two and writes one blogs, established a blogging community for experimental philosophers wanting to adapt cognitive psychology theories. **Woolsey** captured a wider audience to voice his criticisms of Federal Reserve policies during the Great Recession. Both faculty asserted more faculty members would write and cite blogs if it were given greater recognition in the tenure process. Speaking from his **Harvard** experience, **Erdmann** positioned that having blogs indexed in the **ACI Scholarly Blog** database helped Astrophysicists gain greater recognition within the academy for their blogging. As a librarian, **Erdmann** also found **ACI's** archiving and preservation practices helped libraries better preserve these works.

(See also **Pat Sabosik's** column on this topic in *ATG* v.29#4, September 2017.)



***FRIDAY, NOVEMBER 4, 2016**
MORNING CONCURRENT SESSION

Rolling in the Deep: Negotiating to Have it All — Presented by **Kristina Alayan** (Georgetown University); **Jennifer Carroll** (University of New Hampshire); **Aaron Lupton** (York University); **Ronda Rowe** (University of Texas at Austin)

Reported by: **Jharina Pascual** (University of California, Irvine) <jharina@uci.edu>

This session was a distillation of the webinar "Negotiation Skills for Librarians." An important first step to a successful negotiating strategy is addressing the mindset that implies that negotiations are a de facto negative position to be in and that librarians have little or no leverage or skill set to address the issues involved. After taking this step, librarians need to be proactive in profiling the party with whom they would be negotiating. They also need to be cognizant of the content under discussion and the options involved, and what the library is willing or unwilling to give up. Key to this process is the understanding that vendors are equally invested in a successful outcome.

After this, librarians should work together to assemble the four cornerstones of negotiation: creating a team, identifying goals, setting a time frame, and then holding a meeting before the actual negotiation meeting. In assembling team members, a convener should include a wide variety of skill sets and then practice the roles that each member should play. The goals should be specific, measurable, acceptable, realistic, and time-bound (or SMART); they should also take into account the vendor's priorities and identify alternatives to the library's ideal result. Setting a time frame also benefits the negotiation, as it can force a decision upon the parties involved and prevents the process from delving into non-relevant areas. Finally, it is important for the negotiating team to practice with all of these factors in place before the actual meeting. 🐾

Well this completes the reports we received from the 2016 Charleston Conference. Again we'd like to send a big thank you to all of the attendees who agreed to write short reports that highlight sessions they attended. 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

Rumors
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Moving to another **shout out!** This one is for **Lars Meyer** who is the Senior Director of Content at **Emory's Robert W. Woodruff Library**. **Lars** will be working with **Beth** and **Leah** and the **Purdue** team on the **Conference Proceedings**. (and there may be more in the pipeline). Welcome and thanks, **Lars!**

I understand that the **ACI Scholarly Blog Index** will cease publication and all subscriptions terminated by **June 30th, 2018** and no new subscriptions are being accepted. While

the **ACI Scholarly Blog Index** received many positive reviews and industry awards, there was just not enough interest in subscribing to sustain their publishing efforts. I was very sad to hear this because this was a ground-breaking resource that organized much of the chaos that we see on the web. **Larry Schwartz** and **Pat Sabosik** deserve our admiration and thanks!

We have an interview coming soon with **Pat Sabosik**, the managing editor of the **ACI Scholarly Blog Index**. I have to tell y'all that **Pat** is my idol and role model! I remember when I was on the **Choice Editorial Board**. **Pat** was the editor of **Choice** back then. She has gone on to many other executive

positions! And I am sure there are more in the works!

Long time ago, **Irv Rockwood**, one-time editor of **Choice** agreed that **Choice** should have a column about books that libraries needed to keep in their collections and **Collecting to the Core** was born with the indefatigable column editor **Anne Doherty**, (this issue, p.45).

Did I remember to tell y'all that **John Riley** was running for Mayor of Northampton, Mass? Sadly he lost but he plans to run again when there is an opportunity. You go, **John!** And don't you love his **Wryly Noted, Books About Books!** (this issue p.44).

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