Against the Grain

June 2010

And They Were There: Reports of Meetings -- 29th Annual Charleston Conference

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Reports of Meetings — 29th Annual Charleston Conference

Issues in Book and Serial Acquisition, "Necessity is the Mother of Invention," Francis Marion Hotel, and Embassy Suites Historic District, Charleston, SC, November 4-7, 2009

Charleston Conference Reports compiled by: **Ramune K. Kubilius** (Collection Development / Special Projects Librarian, 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 2009 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 that were not printed in the conference's final program. Please visit the **Conference Website** for presentation material (PowerPoint slides, handouts) and taped session links. The **2009 Charleston Conference Proceedings** will be published sometime in Fall 2010.*

*In this issue of **Against the Grain** you will find the second installment of 2009 conference reports. The first installment can be found in **ATG** v.22#1, February 2010. We will continue to publish all the reports received in upcoming **ATG** print issues; however, in the meantime, all the reports that have not yet been published can be found on the **ATG** Website by visiting **http://www.against-the-grain.com**. — RKK*

Concurrent 1 — Thursday, November 5, 2009

Beguiled by Bananas? A retrospective study of usage and breadth of patron- vs. librarian- acquired ebook collections — Presented by **Jason Price** (Head of Collections, Claremont Colleges); **John McDonald** (Director, Information & Bibliographic Management and Faculty Relations, Claremont Colleges); **Kari Paulson** (President, EBook Library)
*NOTE: **Alison Morin** (Accounts/Technical Services Manager, EBook Library) and **Sally Terbeck** (Business Development Manager, EBook Library), did not participate in this presentation, though **Morin's** contribution of data to the study was acknowledged.*

Reported by: **Ava Iuliano** (SLIS Student, University of South Florida) <aiuliano@mail.usf.edu>

Perhaps one of the most intriguing sessions, **Price**, **McDonald**, and **Paulson** delivered a cogent presentation regarding user-selected eBook collections as compared to librarian-selected collections. In a study of five libraries that had a mix of both user- and librarian-selected eBooks, data showed that user-selected collections were used more (about twice as much) by a wider audience than librarian-selected collections. User-selected collections were also as balanced as librarian-selected collections and contained as many scholarly texts. While the implications may point to the lack of need for librarians in selecting eBook titles, **McDonald** and **Price** were quick to point out that the primary issue is the lack of resources to devote librarians to eBook collection development. If user-selected collections are just as good as library-selected collections, perhaps the time can be put to better use, particularly when money and staffing is tight. **Price**, **Paulson**, and **McDonald** also pointed out that a mix of user- and librarian-selected eBooks seemed to work better than solely user- or solely librarian-selected titles. Also, considering that librarians select the platform and the collections that users can select from, user-selection may not be as much of a risk as generally considered after the sobering banana adage, in which users selected and bought every eBook with the word "banana" in the title. In the lively discussion that followed, it became clear that this session's presented findings may have shocked some librarians in the audience.

Collegiality: On your mark, ready, change? — Presented by **Shin Freedman** (Head of Acqusitions & Serials, Framingham State College Library)

Reported by: **Regina Koury** (Idaho State University, Eli M. Oboler Library) <kourregi@isu.edu>

Why do we want to be nice? Is collegiality the same as congeniality? **Freedman** conducted a thought-provoking question-and-answer session. She noted that collegiality is like a common sense: you will notice if it is missing. For instance, 25% of librarians in a **Massachusetts State College Association (MSCA)** Librarian Survey taken on October 2009 reported it as an issue. Library literature does not really talk about collegiality. We, as librarians, "do not apply collegiality as academic freedom, but use congeniality as an interpretation of collegiality." Collegiality is defined as a"cooperative interaction among colleagues and shared power and authority among colleagues." **Freedman** stressed that trust, sharing of ideas, open communication, and leadership are conditions of collegial environment. Why should we care? Collegiality plays a vital role in dealing effectively with changes — when changes are embraced, not preordained. Collegiality also enables better decision making.

Moving to a Virtual Approval Plan: How an ARL Library is Leveraging Funds and Streamlining Workflow — Presented by **Yem Fong** (Director , Collection Development, University of Colorado at Boulder); **Charlene Kellsey** (Faculty Director for Acquisitions, University of Colorado Boulder Libraries); **Kim Anderson** (Chief Bibliographer, Blackwell)

Reported by: **Pamela Grudzien** (Central Michigan University) <Grudz1pa@cmich.edu>

Fong, **Kellsey**, and **Anderson** reported on a multiyear project that moved the library to a more streamlined acquisitions fund accounting system and a virtual approval plan. The library had experienced budget cuts, cancelled $600K in serials, and had turnover in two key positions creating circumstances that were appropriate to making changes. In 2006, **R2 Consulting** was engaged to study the situation and make recommendations on realigning processes to improve workflow and get material to library users faster. The monograph acquisition budget was divided. A lump sum was designated to support all approval orders, removing concerns about which fund should cover interdisciplinary or general titles. Separate funds for bibliographers' firm orders remained, and spending became more predictable. Most important was the collaborative work between the library and vendor that shifted their traditional approval plan to a virtual one. Unless bibliographers deselected electronically from online shipment lists, items were cataloged via **PromptCat** and processed to be shelf-ready upon arrival. The average number of days from receipt of the approval books to ready-for-circulation status was reduced from 45 days to 6 days. The changes freed staff in Cataloging and Marking to work on other collection projects. Overcoming initial reluctance, the bibliographers experienced time savings that allowed them to meet tenure responsibilities and resolve workload issues.

Reconfiguring Collection Development for the Future: A Faculty Print Serials Review — Presented by **Audrey Powers** (Academic Services Librarian for the Arts, University of South Florida); **Matt Torrence** (Assistant Librarian, Engineering, University of South Florida); **Jared Hoppenfeld** (Academic Services Librarian for Business, University of South Florida); **Cheryl McCoy** (Coordinator for Collection Development, University of South Florida)

Reported by: **Kathy Edwards** (Clemson University, Gunnin Architecture Library) <kathye@clemson.edu>

A primary reason I come to the **Charleston Conference** is to learn from the innovative practices and problem-solving of similarly-situated librarians at other institutions, so that I can apply those lessons toward rethinking and improving services and collections "back home."

In this excellent session, several librarians from **USF's Tampa Library** shared the methodology and outcomes of a successful print journals weeding project, which began with a survey of faculty print journal use and preferences in Spring, 2008, and extended into Fall with faculty and graduate student participation in a Web-based print journals review. The project resulted in the cancellation of 223 print journals for a savings of $37,458 dollars — along with additional library funds (for a total of $51,364) — subsequently reinvested in new print and online subscriptions requested by faculty. A driving principle of the project was transparency, in relation to both the community served and the librarians and staff engaged in the project work. This was maintained, externally through continual communication with faculty and students at each step of the review process (via email and Web-based updates) right up to the "chop" decision, including solicitation of new titles, and internally through the coordinated labor of subject specialists and collection development personnel as the work progressed. A summary of the project is online at *http://www.lib.usf.edu/public/index.cfm?Pg=PrintJour nalsReviewSummary*.

Collection Management 101: Developing and Implementing a Workshop Series — Presented by **Meris Mandernach** (Collection Management Librarian, James Madison University)

Reported by: **Miranda Bennett** (University of Houston, M. D. Anderson Library) <mhenry4@uh.edu>

In this engaging and informative session, **Mandernach** described the results of her summer research project, which involved visiting several libraries to investigate the training they were — or weren't — providing for librarians with collection development responsibilities. The project was inspired by her discovery that training was a serious unmet need among her subject librarians, who told her, "We don't know what we're doing!" By visiting other libraries, she learned that little formal training was provided anywhere, although interest in such training was strong, so she developed a series of workshops for **JMU** selectors. The topics of these workshops, planned to last between an hour and an hour-and-a-half each, were (1) policies and the role of the library's collection development committee; (2) approval plans, gifts, and statistics; (3) collection maintenance and new resources; and (4) collection development strategies, such as analyzing departmental research interests and future trends in collections. Her recommendations for librarians interested in starting a similar program include: divide topics into manageable segments, provide lots of hands-on activities, make it relevant, ask selectors to prepare with "homework," address both the current situation and the vision for the future, and discuss how collections connect to other parts of the library.

Are They Being Indexed II? A follow-up to tracking the indexing and abstracting of open-access journals — Presented by **Jack Fisher** (Acquisitions Librarian, Valdosta State University); **Edward Hart** (Head of Technical Services, Fredric G. Levin College of Law, University of Florida); **Elaine Yontz** (Professor, Master of Library and Information Science Department, Valdosta State University)

Reported by: **Tracy L. Thompson-Przylucki** (New England Law Library Consortium (NELLCO) <tracy.thompson@yale.edu>

Yontz moderated this session whose program had its roots in a 2007 **Charleston Conference** session during which participants examined the journals included in the Directory of Open Access Journals (DOAJ) to determine what OA content was being indexed. The premise of the project is that the value of OA journals can be measured by determining if they are being indexed. Since that first session the participants had decided to expand their examination. **Fisher** looked at OA LIS journals and music journals, and **Hart** focused on OA law journals. Both presented their findings at this session.

Fisher found that **Ulrich's** was the best source of indexing info and decided to use that resource exclusively. He discovered that the indexing of OA journals was on the rise from 07 to 09. **Fisher** posited that young journals may not reach the indexes until they have proven their profitability.

Hart used the primary indexing resources for law, including Index to Legal Periodicals (ILP), Current Index to Legal Periodicals (CILP), and Index to Foreign Legal Periodicals (IFLP). **Hart** found that only 22 of the 75 law titles in the DOAJ are currently being indexed. As a result of his findings **Hart** is in discussions with some of the indexing services to expand on that number.

Both **Fisher** and **Hart** plan to continue to track the indexing of OA content.

The Chicago Collaborative: Facing the Grand Challenges of Scholarly Communication — Presented by **Tom Richardson** (Director, Institution Sales & Service, New England Journal of Medicine); **Irving E. Rockwood** (Editor & Publisher, CHOICE); **John Tagler** (Vice President & Executive Director, Professional & Scholarly Publishing Association of American Publishers, Inc.); **Pat Thibodeau** (Associate Dean Library Services & Archives, Duke University Medical Library)

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

Almost 50 interested attendees heard about the year-old **Chicago Collaborative** (*www.chicago-collaborative.org/*) from four panelists who represented four of its member associations. The group was established in 2008 (in Chicago) to provide ongoing dialog, bringing together scholarly communication stakeholders, primarily STM, so they could share and disseminate relevant and appropriate information. The collaborative's genesis was attributed to the initiatives begun by **T. Scott Plutchak** in the **Association of Academic Health Sciences Libraries (AAHSL)** Scholarly Communications Group. After **AAHSL** board approval in Nov. 2007, the group became free-standing, consisting of varied associations' representatives, not individual libraries or publishers. In the spirit of inclusiveness (not the buyer-seller paradigm), the group may eventually invite other "players," be they **Google** or subscription vendors. Challenges and governance issues have been identified, educational initiatives are underway (e.g., tutorials: "Libraries 101" and "Biomedical Publishing 101"), and other efforts may have one-time (a scholarly publishing roundtable report) or ongoing expected outcomes (white paper, dialogs with experts, a sustainable mechanism for communication, a trusted name for scholarly communication discussion). The collaborative group's next meeting? November 11 (after Charleston) during **AAHSL's** meeting in Boston.

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Panelists ably addressed questions, emphasizing that the collaborative seeks out subject matter expertise and attempts to leverage programs already in existence.

Use is King: User-Centered Acquisitions — Presented by **Albert Joy** (Acquisitions/Preservation Librarian, University of Vermont); **Peter Spitzform** (Collection Development Librarian, University of Vermont)

Reported by: **Lisa Lister** (Colorado College, Tutt Library)
<llister@ColoradoCollege.edu>

This presentation, which focused on print rather than eBook acquisitions, explored reasons why the user-driven acquisitions model is challenging to librarians. Historically, collection development behavior was built on several assumptions:

1) Library collections exist in isolation (once, students' main option was to search our catalog and venture into our stacks),

2) There is only one common search tool — the catalog,

3) Print monographs go quickly out-of-print, so it is incumbent on librarians to buy them in a timely manner, and

4) Librarians are needed to acquire well-rounded collections.

Although the first two assumptions have crumbled, the status of assumptions 3 and 4 are in transition. In the current strained economic climate, libraries are being asked by campus administrators to report and review their expenditures with greater granularity. Statistics at the **University of Vermont** show that user-driven purchases are used twice as much as "just-in-case" purchased books. The pressure to justify

expenses and the changing paradigm of digital information access may propel libraries to move toward a user-driven model.

Finally, the speakers shared details of a pilot user-driven purchase plan implemented at the **University of Vermont**, which involved downloading records from **YBP** into their catalog for student-instigated purchase requests. In the last two years, over 600 books have been successfully acquired in this manner.

Use of the Worldcat Collection Analysis Tool to Assess the Statewide Serials Collection in Illinois — Presented by **Chad E. Buckley** (Collection Management Coordinator, Illinois State University)

Reported by: **Heather S. Miller** (SUNY Albany)
<HMiller@uamail.albany.edu>

CARLI, a consortium of 94 Illinois libraries formed in 2005 from several other organizations, established a Statewide Serials Collection Task Force "to investigate various collaborative options related to print and electronic serials collections across the state." The group used the **WorldCat Collection Analysis Tool** to identify widely-held periodicals and further analyzed them by publisher. **Buckley** verified current subscriptions and found that the **WorldCat** numbers were too high. Publishers for which the consortium libraries held a large number of titles constituted what **CARLI** considered working with on package deals. These were not the largest publishers. **Buckley** concluded that the **WorldCat** tool was sufficient to get a rough snapshot of the most widely-held titles and that journal packages from small- and medium-sized publishers would benefit Illinois libraries most. They are also considering extending backfiles. During Q & A, **Andrew Pace**, of **OCLC**, said that he would like to see the **WorldCat Collection**

Analysis Tool used on an ongoing basis to produce dashboards for constant budget analysis. For this to work well, accurate holdings are needed. Automating the holdings updating process would be ideal, but OPACs are hard to penetrate.

The Semantic Web: What you need to know and why it is important for your user community — Presented by **Darrell W. Gunter** (EVP / CMO, Collexis Holdings, Inc.); **Terry Hulbert** (Director of Business of Development, AIP); **Thane Kerner** (President & Chief Executive Officer, Silverchair); **Steve Leicht** (EVP / COO, Collexis Holdings, Inc.)

Reported by: **Rachel Lee** (University of California Press) <rlee@ucpress.edu>

Speaking to a packed room, the presenters for this session provided an engaging overview of the highlights of the semantic Web.

After a brief introduction by **Gunter** (moderator), **Hubert** (**AIP**) stated that at the initial stage of research, most searchers didn't read articles in depth and just skimmed content ("power browsing"), reserving closer reading for articles of interest found along the way.

He demonstrated **AIP UniPHY**, a platform that allows users to search both researchers and subjects and provides visual, context-rich information on collaborators, geographic location, and related research topics.

Kerner (**Silverchair**) claimed that the semantic Web would allow users to think of content as data.

Semantic searching would also draw together the diverse terms involved in search language to give a more complete picture of available information. Health Sciences is a field that would benefit from greater normalisation of terms.

Kerner discussed semantic tagging. He stated that tagging needed to be undertaken by experienced cataloguers.

Liecht (**Collexis**) said that while the technology is not mature, its current uses have more implications for librarians than researchers. One of the barriers to full adoption of the semantic Web is that it mostly resides in vertical applications, and content is not fully structured.

Concurrent 2 — Thursday, November 5, 2009

Partner Your Way to Success: Advancing Consortia Opportunities in the Volunteer State — Presented by **Mary Ellen Pozzebon** (Electronic Resources Librarian, Middle Tennessee State University); **Theresa Liedtka** (Library Dean, University of Tennessee - Chattanooga, Lupton Library); **DeAnne Luck** (Tenn-Share Database Coordinator, Tenn-Share)

Reported by: **Tracy L. Thompson-Przylucki** (New England Law Library Consortium (NELLCO) <tracy.thompson@yale.edu>

This session reported on efforts to maximize library collaboration within Tennessee. Within the state there are numerous consortia, including **Tenn-Share**, but none operating at the state level with the necessary resources to leverage buying power and coordinate efforts strategically. In the current economy the academic libraries realized they needed to join forces in an effort to move from cooperation to real, robust collaboration. They realized this would require a culture shift among the players. To begin the change process, **Pozzebon**, **Luck**, and **Liedtka** convened a meeting of the identified stakeholders to discuss and establish a sustainable model for collaborative acquisition of e-resources. The meeting resulted in a clear plan and a firm (but ultimately overenthusiastic) timeline. They decided to approach **Lyrasis** to handle their vendor relations. **Tenn-Share** would serve the role of library liaison. The group

also created a survey that was used to map the e-resource environment within the state. The survey showed that the 81 libraries responding held 829 unique e-resource titles. The group decided to focus on those resources for which there were 10 or more license agreements within the state. That involved 46 individual vendors. **Lyrasis** worked with the vendors with varying degrees of success. Some vendors extended as much as a 15% discount, while others cut their proposed increases. Overall the program has been successful. **Tenn-Share** has subsequently established a standing e-resource committee charged with improving the process. They are exploring new strategies for additional savings and will continue their efforts.

WorldCat Selection: Multiple Vendors, One View — Presented by **David Whitehair** (Senior Product Manager, OCLC); **Boaz Nadav-Manes** (Head, Acquisitions Services, Philosophy Selector, Cornell University Library); **Dawn M. Waller** (Head, Acquisitions Department, University of Virginia)

Reported by: **Katherine L. Latal** (SUNY Albany) <KLatal@uamail.albany.edu>

Whitehair set the stage with a brief overview: the vendor identifies titles using the library's profile, and the titles are sent to **OCLC**, loaded into **WorldCat Selection (WS)**, and viewed by selectors. He provided critical details: vendor data added to the MARC record in the ILS is customizable; each library determines how long data are retained; some vendors provide links from **WS** to their site; turn-around time may decrease; data help selectors submit orders throughout the entire year.

Nadav-Manes implemented **WS** in order to continue to provide service even after both the budget and staff were decreased. By streamlining their selection process and using a program to assign vendors automatically based on a matrix of characteristics, 90% of their orders are loaded into their ILS as pending. The 10% that are "kicked out" are handled manually.

Waller reported that they buy from 35-40 vendors regularly. All selectors use this one-stop shop for the three vendors they have set up now. They plan to add more vendors later. Using this tool was advantageous for building the East Asian collection because they did not need to do any transliteration. Another advantage is that an **OCLC** number is provided for each record.

Leveraging YOUR Assets : How BCR, BiblioLife and Ingram came together to help libraries through the Shelf2Life program — Presented by **Gillian Harrison Cain** (Director of Marketing & Program Development, BCR); **Michael Levine-Clark** (Collections Librarian, University of Denver); **Mitchell Davis** (VP, Business Development, BiblioLife) *NOTE: **Mark McQuillan** (Senior Account Executive, Coutts Info Services/Ingram Content Group), spoke instead of **Carolyn Morris** (Business Development, Coutts Info Services/Ingram Content Group).*

Reported by: **Ann M. Watson** (Ohio University – Lancaster, Hannah V. McCauley Library) <watsona2@ohio.edu>

Cain, **Levine-Clark**, **Davis**, and **McQuillan** explained their role in the unique collaborative project known as **Shelf2Life**. The presenters each described how the complete digital solution for handling locally-owned content came together. The **Bibliographic Center for Research (BCR)**, a non-profit library network in Colorado, had members who were interested in digitizing pre-1923 items of interest in their collections. These libraries were looking for a low- or no-cost point of entry that could possibly create a revenue stream for the library by allowing print-on-demand for the materials. **Ingram** recognized the demand for historical titles and the opportunity to utilize eBooks, so they provided the eBook platform, the print-on-demand capabilities for the project, as well as the aggregation of the content. **BiblioFile** entered the project offering the mass digitization experience and sophisticated packaging

and marketing platform for selling historical content. **Levine-Clark** shared the pros and cons for participating libraries. Benefits included cost-effective digitization, shared access to collections, a new use for older materials, increased shelf space for libraries, and potential revenue for libraries. Drawbacks mentioned were the physical limitations of what could be sent, such as folding plates, the lack of control over the process *and* the digital object, and the contribution to a "for profit" collection instead of an open-access collection. Also the economic downturn has made it hard for some universities to put the project at the top of their priority list. The cooperative **Shelf2Life** has been in existence for almost one year and has over 3,000 already digitized.

Giving the People What They Want: User-driven Acquisition of Journal Articles — Presented by **Adam Murray** (Interim Dean of University Libraries, Murray State University); **Ryan Weir** (Serials and Electronic Resources Librarian, Murray State University)

Reported by: **Regina Koury** (Idaho State University, Eli M. Oboler Library) <kourregi@isu.edu>

What are the creative ways to manage subscriptions when acquisition budgets at many libraries have gone flat or are substantially cut? **Murray** and **Weir**, speaking to a standing-room-only crowd and in a very interactive session, addressed this issue. **Murray State University** turned to the "pay-per-view" program with **ScienceDirect Complete**. Funds were allocated to different accounts/departments, with an email alert set up when an account gets short on money. The departments also generated logins for the faculty to track usage of the "pay-per-view" articles. Students get access through the reference desk. The funds continue to roll over as long as you keep at least one **ScienceDirect** subscription. The article access is instant and available for 24 hours only. If the article requested is from a journal **Murray State** subscribes to, **ScienceDirect** will automatically let the patron know. Tracking usage by logins and exploring partnerships with other providers of "pay-per-view" options are next steps for **Murray State**.

Impact Factors, Post-Publication Peer Review and Other Metrics — Presented by **Richard P. Grant** (Information Architect, Faculty of 1000)

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

Former research scientist **Grant** was "vendor neutral" and didn't use his company's product as a case study when he named varied stakeholders (scientists in the lab, funding bodies, librarians, and publishers) and discussed challenges of measuring (getting a grip on) quality, and relevant knowledge. Journal impact factor, for many years the de facto standard, has limitations. New attempts and tools: crowd sourcing, mapping "where people went afterwards," tracking comments, learned opinion, and opinion collations (more easily done in smaller communities). Lively audience participation abounded: How might we get a handle on the quality metric? Is discovery or the right answer most important? Is peer review itself (not impact factor) flawed? Peer review doesn't tell you if an article is a big or small step forward, but a "five years later" study may reveal "Is it influential?" and impact factor bears it out. Just because someone is pointing to something does not mean it's good. The concept of "quality" is social, flawed, and difficult to measure. Humanities: even more political than science. Money is at stake, and funding agencies develop their own measures. Should there be a basket of indicators? Replace or add to impact factors? **Eugene Garfield** always said to use other metrics.

Microforms in a Digital World — Presented by **Tinker Massey** (Serials Librarian, Embry-Riddle Aeronautical University)

Reported by: **Andrew Grimball** (SLIS Student, University of South Carolina) <andrewgrimball@gmail.com>

The focus of **Massey's** talk was to emphasize the relevance that microforms still play in today's realm of constantly evolving digital content. **Massey** augmented the lecture with a supplemental handout that provided an outline for the presentation, as well as further resources for attendees to consult. She started the presentation by first learning the backgrounds of the attendees and opened herself to questions and concerns throughout the talk. She gave a topical overview of the microfilm format, covering its progression from the history to the future of the material. Other issues were discussed such as microfilm's preservation and the benefits and drawbacks of using it. While a concern is that microfilms are not frequently used and take up space, the benefits of retaining a physical copy outweigh such drawbacks. Microfilm is also a valuable way to retain records of journals and newspapers, as backlogs of such materials would take up far more space than microfilms. Despite new ways of digitizing information, **Massey** is an advocate of continuing the use of microfilm. Her talk was well-organized and directed, yet flexible enough to make it relevant for those who attended.

Let's Go For It – Moving from print to electronic and feeling secure about it! — Presented by **Eileen Fenton** (Managing Director, Portico, Ithaka); **Roger Schonfeld** (Manager of Research, Ithaka S+R); **Brandon Nordin** (American Chemical Society)

Reported by: **Mary Krautter** (University of North Carolina at Greensboro, Jackson Library) <mmkrautt@uncg.edu>

The three presenters represented multiple dimensions of transition from print resources to electronic. **Nordin** addressed economic and scholarly concerns of the **American Chemical Society** as this professional organization made a rapid and dramatic transition to electronic formats, including eliminating print journals for **ACS** members. Aspects of the cost of digital platforms vs. the cost of paper production were discussed as critical elements of new economic models for publishers. **Fenton** described **Portico**, a digital preservation archive project currently including over 14 million articles, which provides a way to alleviate concerns from both publishers and libraries about preservation of content as digitization increases. She emphasized the need for collaboration between libraries and digital repositories in the digital preservation effort. **Schonfeld** of **Ithaka** presented a decision making model to guide libraries in the process of deciding what print materials can responsibly be withdrawn. His remarks were based on the report which he co-authored, "What to Withdraw: Print Collections Management in the Wake of Digitization," published in September 2009. The three were an effective panel in representing practical experience and extensive knowledge of various dimensions of the transition from print, but they lacked sufficient time to cover all the issues that they raised.

Can Library Values be Outsourced? — Presented by **Bob Nardini** (Group Director, Client Integration & Head Bibliographer, Coutts Information Services); **Jeannine Wiese** (Collection Development Specialist, Ingram Content Companies); **Alan Mattlage** (Art & Architecture Team Leader, University of Maryland); **Ellen Davyes** (Selector/Bibliographer, Coutts Information Services); **Joshua Winant** (Manager, Collection Management Services, YBP Library Services); **Kim Anderson** (Head Bibliographer, Blackwell Book Services)

Reported by: **Kathy Edwards** (Clemson University, Gunnin Architecture Library) <kathye@clemson.edu>

As an academic librarian, I was drawn to this session by the prospect of hearing vendor-employed selectors describe the intellectual machinery behind the curtain of subject-specific academic approval plans — a topic not on the agenda, as it turned out. **Mattlage** opened with the rhetorical question, "Are academic values and maximizing profit antithetical?" (or, "Are collection development librarians and vendors motivated by the same ideals?") and offered the response "Can be, but we proceed on the assumption that they are not." **Anderson** countered that, in today's information economy, library values *need to be* outsourced in the form of approval plans, distilling the point down to its most essential realities. Even as academic librarians strive to shape ideal collections for their constituents, approval plans are our primary means of acknowledging/embracing/rationalizing the impracticalities of ideal realms. In the remainder of the session, vendor representatives shared "war stories" of dust-ups with public and school librarians and patrons over explicitly erotic/violent/profane/otherwise controversial images and/or texts in book lists, and emphasized their goal of providing customized solutions for individual customers. In particular, **Wiese** of **Ingram Content Group** shared her experiences and expertise with graphic novels and provided numerous examples.

Basic Accounting Concepts and Techniques for Acquisitions Professionals — Presented by **Rachel Kirk** (Collection Management & Acquisitions Librarian, Middle Tennessee State University)

Reported by: **Sharon Dyas-Correia** (University of Toronto Library) <s.dyas.correia@utoronto.ca>

A discussion of basic accounting techniques to help librarians maintain fiscal order was the subject of **Kirk's** well-attended, standing-room-only presentation. Judging from the crowd in attendance, all things budgetary and financial were on the minds of many librarians attending the conference. In the time allotted, the speaker was barely able to scratch the surface of topics like budgeting strategies, spreadsheets, budget reconciliations, five-year projections, inflation and its impact on book and serial budgets, cost-benefit analysis, negotiation of contracts, and well-designed cancellation projects. There was not time to cover cash flow analysis and compounding inflation. **Kirk** pointed out that acquisitions and collections librarians can do a better job if they understand and analyze the financial implications of possible decisions and then negotiate wisely. The presenter suggested that, especially in these difficult financial times, a librarian's education should include financial education in order to project financial needs, as well as to analyze the cost effectiveness of long-standing products. The consensus of the group was that more presentations on these topics are essential.

Delivering the Goods: Understanding the Academic Library Supply Chain — Presented by **Adam Wathen** (Head, Collections Services Department, K-State Libraries)

Reported by: **Ava Iuliano** (SLIS Student, University of South Florida) <aiuliano@mail.usf.edu>

Relying heavily on business models of service supply chains, **Wathen** described the process of delivering services in an academic library environment by stressing the need for more appropriate services and keeping the product in line with the goals of the institution. By adhering to the idea of only doing things that move the library forward, a sleeker model of service and supply becomes apparent as extraneous services and products are cut away. The supply chain model allows the institution to achieve more with the same resources, increasing the level of service or, in times of economic hardship, to achieve the same level of service with fewer resources. By making sure that the work of one section compliments another, the advances of one area of the library will benefit all. **Wathen** urged academic libraries to articulate a mission and then adopt workflows to meet the specific purposes defined therein.

Creating input and outputs of the supply chain based on the mission and workflows will create the right product and increase efficiency and service. The over-arching theme is creating leaner workflows to allow academic libraries to provide better service by focusing on the mission and supporting services that are directly relevant to said mission.

Afternoon Plenaries — Thursday, November 5, 2009

"It's the Economy, Stupid": Dealing with High Acquisition Goals in Low Economic Time — Presented by **Mehdi Khosrow-Pour, Moderator** (President, IGI Global); **James Wiser** (Assistant Director, Statewide California Electronic Library Consortium (SCELC); **Robert L. Watkins** (Associate Executive Director, Amigos Library Services, Inc.); **John G. Dove** (President, Credo Reference); **Wendy Shelburn** (Electronic Resources Librarian, University of Illinois at Urbana-Champaign); **Lia Hemphill** (Director of Collection Development, Alvin Sherman Library, Nova Southeastern University); **Kevin Sayer** (President, ebrary)

Reported by: **Heather S. Miller** (SUNY Albany) <HMiller@uamail.albany.edu>

This program explored ways to collaborate in order to survive budget cuts and increased demand. Moderator **Khosrow-Pour** provided introductory comments. **Hemphill** described facing a 38% budget cut, added costs when journals change publishers, and evaluating every purchase. **Shelburn** described maximizing funding sources and exploring repurposing staff and staff funds, consolidation, outsourcing, accepting "good enough," reconceptualizing work, and pursuing cancellations and renegotiations. **Sayer** focused on the importance of libraries "demonstrating value through usage and outcome data" and the need to maximize discoverability and accessibility, using every possible avenue to heighten awareness of library offerings (e.g., integrating content into the library Website, email, RSS feeds, pushing content to users, and using social networking sites and e-newsletters to keep end-users informed). Data are crucial but much more readily available for printed materials. **Watkins** recommended the book *Negotiating to Win* and encouraged librarians to ask open-ended questions, shop and compare, and ask for what they need. **Wiser** noted that librarians don't know their vendors well enough and vendors still don't know how to price content, while our crisis is tame compared to some others. **Dove** stated that now is the time for transformative change. This is a time to step back, examine fundamental principles, and pursue change. With the "wake-up call" of research being more difficult in the digital age because students lack context, there is transformative potential in reference works.

Morning Plenaries — Friday, November 6, 2009

Discovery versus Disintermediation — Presented by **Jane Burke** (Vice President, Serials Solutions)

Reported by: **Anna Fleming** (Northwestern University, Galter Health Sciences Library) <a-fleming@northwestern.edu>

Burke expounded on how libraries become increasingly removed from the research process when users regularly begin their research with **Google** and move unknowingly into library-purchased content. Citing "Project Information Literacy," a study of early adult research habits out of the **University of Washington's iSchool**, she highlighted a user preference for "bountiful" resources and an impatience with opaque systems. Further, she declared the OPAC dead, or at least moribund, now that it is no longer the primary discovery tool for researchers. **Burke** urged libraries to mask complexity from users — including to give up bibliographic instruction as an introduction to the library — in order to make discovery easier and less intimidating. She talked of using Web-scale technologies (**Primo Central**, **Summon**, **Google Scholar**) to simplify searching and to promote a library's collections.

Our Common Future — Presented by **Ivy Anderson** (Director of Collections, California Digital Library)

Reported by: **Audrey Powers** (University of Florida)
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Anderson began her presentation by summarizing the current state of affairs with an analysis based on three perspectives: the bad news (the economy), the uncomfortable news (rise of digital technologies and the information explosion) and the good news (creating a sustainable future). To address sustainability, thought-provoking questions related to what issues you are grappling with, how you are coping, and what you are doing to be sustainable were posed. Her analogy to the Army Field Guide and library operations acknowledged where libraries need to change:

Defense – Reduce costs of core operations

Offense – Effective transformation

Joint Operations – Develop deep collaborations to share resources

She mentioned several major projects underway that epitomize retooling the way we do business such as **Judy Luther's** approach to rethinking technical services (Streamlining Book Metadata Workflow), the recent agreement between **Columbia** and **Cornell** to collaborate and redirect emerging resources to collections and services (**2CUL**), collaborative management of print collections (**Heading WEST: Towards a Western Regional Storage Trust**), and the large scale shared digital repository (**HathiTrust**).

During her presentation she interwove examples from the **University of California Libraries** to illustrate her points. This approach was useful to many librarians attending the conference because the **University of California Libraries** provides benchmarks of future initiatives for many libraries.

The Google Settlement One Year Later — Presented by **Anthony Watkinson, Moderator** (Senior Lecturer, Centre for Publishing, University College London); **Jan Constantine** (General Counsel, Authors Guild); **Allan Adler** (Vice President for Legal and Governmental Affairs, American Association of Publishers)
NOTE: ***Dan Clancy*** *(Engineering Director, Google), did not participate in this panel presentation.* ***Peter Givler*** *(Executive Director, Association of American University Presses), joined the panel.*

Reported by: **Sharon Dyas-Correia** (University of Toronto Library)
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Watkinson began this interesting plenary session by introducing the panel, thanking them for their participation so close to the expected November 9th ruling, and summarizing a previously distributed handout that outlined eight major library concerns related to the **Google Book Settlement**. **Adler** discussed how the settlement came to be and gave a brief history of events leading up to the litigation. **Constantine** focused on author issues and the **Google** print program, and **Givler** talked about how a complex problem had been tackled and brought to a reasonable conclusion and indicated, as did the other panelists, that it will be interesting to see the revised settlement. Some illuminating discussions followed around distinctions between the ways commercially available and out-of-print material will be treated, whether or not innovation and competition will be stifled, the need for legal oversight, what fair institutional pricing will look like, issues related to the privacy of individuals accessing material, and the impact of loss of access to illustrations not found in picture books. **Adler** made the final point in the discussion by wondering what will happen if a settlement is not reached, and he concluded that the best alternative is a **Google Settlement**. 🌿

That's all the reports we have room for in this issue, but we have many more reports from the ***2009 Charleston Conference*** *which we will continue to publish in upcoming issues of* ***Against the Grain***. *In the meantime, all the reports that have yet to be published can be found on the* ***ATG*** *Website by visiting* ***http://www.against-the-grain.com***. *Presentation material (PowerPoint slides, handouts) and taped session links from many of the 2009 sessions are available at* ***www. katina.info/conference***. *You may also visit the conference Website (****www.katina.info/conference****) for details about the* ***2010 Charleston Conference***. *— KS*

Something to Think About — Nothing's the Same Anymore!

Column Editor: **Mary E. (Tinker) Massey** (Serials Librarian, Embry-Riddle Aeronautical University, Jack R. Hunt Library) <masse36e@erau.edu>

Used to be that you could tell what building was the library. It meant something to you, and it stirred your emotions or excitement just to know it was there and you would be entering. The world has changed. Now, there need not be walls or paintings or books, just the constant hum of a standalone computer or laptop. Many students find that being curled up in their favorite chair at home or a nearby coffee shop is just the perfect virtual library for them. We defined our library by its physical nature, the people we went to see for answers, and/or the things that the walls housed (books, journals, music, art, etc.). We must now take a different look at the nature of the library.

The Collection is turning into a mass of electronic images on the screen. More and more of the books and journals we held in our hands are turning into animals we unleash with the depression of a computer key stroke. They dance around the lighted venue and entertain us as we read, leaving <u>no</u> smell of leather bindings to remember. What will our memories be? I have recently experienced a **Kindle** in my hands and it wasn't all bad, but I have a tendency to fall asleep while reading and the fun was finding my place again after dropping the material. Now, the **Kindle** remembers where I was. Takes all the fun out of it! Makes senior moments in the book world non-existent! The library is moving toward an all electronic

collection. I can see some advantages, especially economically, but most of these things you can't own. It's a rent-it and throw-it-away world. How did we get here? Where do you go from here? I think some day there will be another kind of communication system that will replace computer and digital things, but who knows what that will be? I can't help remembering *The Time Machine*, where one of the future libraries had many rings of knowledge that could be spun and the harmonics created. These spoke