

# And They Were There

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## Reports of Meetings — 28th Annual Charleston Conference

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### Issues in Book and Serial Acquisition, “The Best of Times ... The Worst of Times,” Francis Marion Hotel, Embassy Suites Historic District, and College of Charleston (Addlestone Library), Charleston, SC, November 5-8, 2008

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Charleston Conference Reports compiled by: **Ramune K. Kubilius** (Collection Development / Special Projects Librarian, Northwestern University, Galter Health Sciences Library) <r-kubilius@northwestern.edu>

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*Column Editor's Note: Thank you to all of the conference attendees who volunteered to become reporters, providing highlights of so many conference sessions. In this PDF file, we are providing the remaining reports which have not yet been published in the print edition of **ATG**. These reports will still appear in print in upcoming **ATG** issues, so keep watching. You may also, visit the **Charleston Conference Website** for handouts and presentation outlines from many conference sessions. The 2008 **Charleston Conference Proceedings** will be available later this fall. — **RKK***

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#### Lively Lunches — Friday, November 7, 2008 continued

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##### *Facing Hard Times: A Briefing on Scholarly Communications*

— Presented by **Julia Blixrud** (Assistant Executive Director, External Relations, ARL, & Assistant Director, Public Programs, SPARC, Association for Research Libraries (ARL)); **Molly Keener** (Reference Librarian, Wake Forest University Health Sciences, Coy C. Carpenter Library); **Cheryl S. McCoy** (University Librarian, Natural Sciences / Government Documents, University of South Florida); **Ramune K. Kubilius**, **Moderator** (Collection Development / Special Projects Librarian, Northwestern University, Galter Health Sciences Library).

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

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Thursday and Friday lunchtime scholarly communication discussions approached the topic differently. In Friday's session, moderator **Kubilius** shared definitions, activities, and job description fragments that might fall under the “scholarly communication” umbrella. **Blixrud** provided an overview on life cycle management issues surrounding the “stuff” (documents, texts, other) being created; the structures and services for dealing with them, the people (“us” and “them”) experiencing changing jobs. Libraries need to know institutional cultures — we go out and “get stuff,” or lead users to it. Institutional, national, world-wide policies will shape access. Take advantage of organizations’ (**ACRL**, **SPARC**, etc.) sites, toolkits, training (many were in **McCoy**'s handout). **McCoy** shared her experience in state-wide (11 universities') initiatives addressing **Janus Conference Challenge Six**, on scholarly communication. She chaired a group that communicated virtually, coordinating statements on a mission, plans, and activities. Perhaps a Florida digital library will be the next step? **Keener** discussed her institution's strategies and activities: campus-wide scholarly communication committee, education of library staff, liaison librarian involvement, and partnering with research offices who refer publication-end questions to the library. **NIH Public Access Policy** support is essential, not only for biomedical authors. A library-sponsored workshop was warranted with implementation of electronic theses and dissertations, then a move towards an institutional repository. Curious attendees asked how much of **Keener**'s day is spent on the activities she described. Reply: 40-60%.

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**Tossing Traditional Collection Development Practices for Patron Initiated Purchasing: A Debate** — Presented by **Sue Polanka** (Head, Reference/Instruction, Wright State University Library); **Alice Crosetto** (Assistant Professor of Library Administration; Coordinator, Collection Development; Acquisitions Librarian; Carlson Library, University of Toledo); **Michelle Harper** (Global Product Manager, NetLibrary)

Reported by: **Kristine E. Mudrick** (Francis A. Drexel Library, Saint Joseph's University) <kmudrick@sju.edu>

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**Polanka**, **Crosetta** and **Harper** delivered a lively presentation on “patron-initiated purchasing,” where patrons decide what will be added to a library collection. Recording answers to several questions using clickers and immediately presenting the results engaged the audience and fostered discussion. **Polanka** and **Crosetta** presented from the perspectives of a library where eBooks are popular and of a second where they aren't, demonstrating that what works for one library may not work for another. **Harper** provided an overview of patron-driven acquisitions and described **OCLC's NetLibrary** as an example of eBook content delivered effectively and at reasonable cost. Librarians need to recognize the needs and preferences of their patrons and their institution's curriculum. They need to be willing to relinquish at least some control of purchasing to patrons who may not be subject experts and who may not be interested in the overall development of the library collection. Patron-initiated purchasing can be managed like approval plans; purchasing profiles can be refined and funds distributed. Buying books at the point of need means that these books will definitely circulate and instant delivery increases patron satisfaction but this method would likely not be used as a single solution for collection development.

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**Usage Statistics: Best Practices and Practical Applications from a Librarian's Perspective** — Presented by **Cory Tucker** (Head, Collection Management, UNLV); **Bonnie Tijerina** (Digital Collection Services Librarian, UCLA); **John McDonald** (Director, Information & Bibliographic Management and Faculty Relations, Libraries, Claremont University Consortium); **Virginia Kinman** (Electronic Resources Librarian, Longwood University)

Reported by: **Susan L. Kendall** (Dr. Martin Luther King, Jr. Library, San Jose State University) <susan.kendall@sjsu.edu>

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This standing room only session featured a dynamic panel. **Tijerina** from **UCLA** moderated the panel. **McDonald** gave an overview of the **COUNTER 3** release implications. New reports include statistics on full text article requests by month and year. There are also new features in consortia reports and in specifications of report delivery. **Counter 3** will include auditing certification for database vendors. **SUSHI** is now a requirement for compliance. Future issues include new media materials compliance; new communities.

**Tucker** demonstrated a program on usage statistics for budget justification which in turn assists in strategic planning projects. The result has been improved marketing of databases to faculty and students

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and giving feedback to vendors. Cory reported on the workflow the department follows in collecting the statistics. Reports on costs per search and full text views are written and the reports are then sent to the provost twice a year.

**Kinman** reported that her university has a smaller student population. Instead of using a commercially produced ERM, they developed a **Microsoft ACCESS** program to track trends and uses. **Virginia** suggested that the electronic librarian wiki <http://www.electroniclibrarian.org/erlwiki> has a portal on best practices on usage statistics.

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***Walking the Usage Tightrope: Publishers and Librarians Explore the Delicate Balancing Act between E-Content Usability and Intellectual Property Protection*** — Presented by **Jackie Zanghi-LaPlaca** (Director of Electronic Databases, IGI Global); **Jim Dooley** (Head, Collection Services, University of California, Merced); **Kirstin Steele** (Head of Collection Management, Citadel); **Selden Durgom Lamoureux** (Electronic Resources Librarian, North Carolina State University Libraries)

Reported by: **Ann Marie Miller** (SLIS Student, University of South Carolina) <annmarie.miller@gmail.com>

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Breaches of security, licensing agreements, and how they are accidentally violated, were the topics of this session. There is a balance between usability versus security. (A lot of the presentation was rather technical and I can't say that I understood the entire thing, as someone who is just entering the profession.) Most of the session time was spent in the audience asking questions of the librarians who were in charge of the session. It becomes an issue, that while libraries want to make sure the system is usable, users often don't understand what types of usage violate the intellectual property rights of the creators. A lot of the questions presented scenarios where someone had violated intellectual property rights and was dealt with, and the problems that result when an entire service is taken away because of the actions of a single user.

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***Observing Faculty and Graduate Students Using Journal Literature: A View from the Field*** — Presented by **Helen Anderson** (Head, Collection Development, University of Rochester); **Katie Clark** (Associate Dean, Public Services and Collection Development; University of Rochester)

Reported by: **Amelia Glawe** (SLIS Student, University of South Carolina) <GLAWEA@mailbox.sc.edu>

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**Anderson** and **Clark** discussed their findings during a study of the search and usage of journal articles among college graduate students and faculty. During this study, the researchers, with the help of an anthropologist, reviewed transcripts of a series of videotaped interview conducted in connection with two grant funded projects at the **University of Rochester**. During their studies, the researchers found that graduate students were admittedly not confident searchers, whereas members of the faculty were very confident with their search technique. Graduate students tended to save or print every article they thought may be important whereas faculty rarely printed or saved articles. Graduate students expressed a tendency to search authors and/or journals suggested by faculty. Faculty also expressed a familiarity with authors and journals that could be reason for their heightened confidence with library searches. Overall, **Anderson** and **Clark** discovered large differences between the searching and usage techniques of graduate students and faculty members.

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**Concurrent Sessions 1 — Friday, November 7, 2008**

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***'Tis a Far, Far Better Thing... Maybe: Electronic Selection in a Multi-Vendor Environment*** — Presented by **Dianne Keeping** (Collection Development Librarian, Social Sciences, Memorial University Libraries); **Lisa Goddard** (Division Head for Systems; Memorial University Libraries)

Reported by: **Rita M. Cauce** (Florida International University, Green Library) <caucer@fiu.edu>

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**Memorial University Libraries** was one of the first adopters of **OCLC's new WorldCat Selection** with 9xx/EDI. The presenters outlined the work they did leading to the decision to implement this new system, describing the procedure from a completely paper-based monograph acquisitions workflow to a largely electronic environment. **WorldCat Selection** interface was also demonstrated in detail.

**Memorial University Libraries** spend approximately \$1.5 million annually in monograph acquisitions. They do not have a major approval plan. They received paper slips from three large vendors (**Blackwell, Coutts, YBP**), plus others, resulting in over 150,000 slips per year. These slip notifications had to be sorted manually, routed to faculty through campus mail, checked manually in the library's catalog for duplication, orders were created manually in the ILS, and then invoices were entered twice: first in the ILS and then in the university's financial system, **Banner**. They calculated data was re-keyed about nine times during the paper-based acquisitions workflow. An EDI Steering Committee has put together consisting of members from Systems, Collections, Acquisitions, Cataloging, and Administration. The ideal situation was to be able to view title notices from multiple vendors in one system. The solution: **WorldCat Selection**. **WorldCat Selection** allows selectors to view multi-vendor slips in one place, allows selectors to view colleague's selections reducing duplications, provides **OCLC** MARC records for loading at point of order, and alerts to duplicate slips. Invoices are also loaded electronically and a cross-walk allows this information to be fed into the **Banner** financial system. Conclusion: electronic selection much better for selectors and acquisitions, although there are some bugs as it is still a new product.

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***Monographs in the Age of Mass Digitization*** — Presented by **Robert H. McDonald** (Associate Dean for Library Technologies, Indiana University); **Dana Sally** (Dean of Library Services, Western Carolina University); **Heath Martin** (Collection Development Librarian, Western Carolina University); **Amy Miller, New Speaker** (Ingram Digital)

Reported by: **Audrey Powers** (University of South Florida) <apowers@lib.usf.edu>

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This session included many thought provoking aspects regarding print content being transformed digitally. The audience was inspired to think about the monograph as a concept that can be produced in many ways. A comparison of the process and development of print to the process and development of digitization was given to point out that they all perform the same function; to store, preserve and distribute content. Essentially, print equals digital and vice versa; thus, print content must be digitized and digital materials must be printed. With the capability of global print on demand, collections can be exposed and content preserved. Digitization initiatives are in their infancy, however, access and delivery of content and in any and all ways is important task to accomplish.

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**China: Market Contours and Opportunities** — Presented by  
**Greg Tananbaum** (Consultant, ScholarNext); **Boe Horton**  
(Senior Vice President of Research Solutions, ProQuest)

Reported by: **Cordelia Wilson** (SLIS Student, University of  
South Carolina) <Wilson29209@aol.com>

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**Tananbaum** provided an overview of developing trends in China's market. China has invested heavily in its academic sector resulting in dramatic increases in the number of universities, college students and university faculty. Encouraged by Chinese governmental incentives, its scholars have published a large number of papers in Western journals. Yet, the research, in proportion to its quantity, is not frequently cited by Western scholars. **Tananbaum** examined barriers that may be limiting the influence of Chinese scholarship and presented his original study on the perceptions of Chinese academics regarding the Western reception of their research. He concluded that Western publishers and information providers should be seeking ways to tap into the enormous potential of the growing Chinese academic market.

**Horton** discussed how the cultural influence of Confucianism can be seen in Chinese business protocol, especially in the concepts of face (mianzi) and connections (guanxi). Specifically, he addressed in detail the dos and taboos in handling business cards and attending or hosting a Chinese banquet. He ended by briefly speaking about the electronic journal publishing environment in the country and the active role that **ProQuest** has been playing in the Chinese information market for over a decade.

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**Retrospective Titles: Verification and Online Access** —  
Presented by **Charles F. Hillen** (Head, Monograph Acquisitions  
and Metadata Services, The Getty Research Institute); **Ann J.  
Roll** (Acquisitions Librarian, The Getty Research Institute)

Reported by: **Kelly Smith** (Eastern Kentucky University  
Libraries) <kelly.smith2@eku.edu>

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**Hillen** and **Roll** presented their process for pre-order verification of online availability of retrospective titles. The library focuses on the history of art, architecture, and archaeology, and relevant materials in the humanities and social sciences. The collection currently includes over a million secondary source volumes, including books, periodicals, and auction catalogs. The collections' scope ranges from prehistory to contemporary art with a focus on Western Europe, but is expanding to include Latin America, Eastern Europe, and Asia. They also house a unique conservation collection, a photo study collection, institutional records and archives, and special collections.

With no date or language restrictions, selection and acquisition can be challenging. The **Getty Library** has 12 approval plans in addition to firm orders and fulfillment of researcher requests. They employ the **OCLC WorldCat Selection** service. Staffing in Collection Development includes two bibliographers and one fulltime assistant. Acquisitions has six FTE staff including one supervisor, two working on firm orders, and three in receiving.

When a retrospective request is received, staff members have four options for locating the materials: vendor selection tools; online secondhand booksellers, free digitized versions on the open Web, and **OCLC**. They start by searching for open access versions, beginning with the **Internet Archive** ([www.archive.org](http://www.archive.org)), a repository of public domain digitized material to which the **Getty** also contributes content. The presenters cited as a recent example a rush order for a French Title published in 1887 that would have been difficult to obtain in print — they

found it in the **Internet Archive**. They also maintain a list of publishers and libraries that offer free digitized versions such as **eScholarship** ([escholarship.cdlib.org](http://escholarship.cdlib.org)) and **Gutenberg-e** ([www.gutenberg-e.org](http://www.gutenberg-e.org)). Finally, they search grey literature and individual small publishers, a step which is particularly helpful in locating materials for the conservation collection. They will consider adding more sites to their verification process over time, but will carefully assess the potential for pay-off. Sites like **Gutenberg-e** don't have a lot of content yet.

According to the presenters, "While library vendors are centralizing the purchase of eBooks that are available through major distributors, there is no centralized location in which to locate free materials."

Vendors are unlikely to take on this task because there is nothing to sell. They are trying to encourage vendors to consider developing such an aggregating service, for which libraries may be willing to pay to save staff time. At one point, the **Digital Library Federation** had an idea for a **Registry of Digital Masters (RDM)** that would be a "one stop shop for Institutional Repositories." They were unable to find a host for the registry. **OCLC** is currently housing some records for these.

Currently, we have to balance cash flow (i.e., free access) with cost-benefit (i.e., staff time to search for free access). At this point, the **Getty Library** thinks that the experiment is worth the trouble. It is arguable that staff time is wasted because, for them, the full gamut of research, ordering, payment, and receiving, is much more time consuming and costly. However, because of the pre-order search and discovery process, patrons and staff have reacted positively when notified that free online access to a requested title was located. Some libraries may be uncomfortable with linking to things they don't own. But librarians of the future will increasingly need to be concerned with mediating access over maintaining ownership.

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**Return on Investment of Academic Library E-Journal  
Collections: A Study of ROI in Grant Writing** — Presented by  
**Carol Tenopir** (Professor, University of Tennessee);  
**Tina Chrzastowski** (Chemistry Librarian, University of Illinois);  
**Judy Luther** (President, Informed Strategies  
(Note: **Michael Kurtz** (Astronomer, Harvard-Smithsonian Center  
for Astrophysics), was incorrectly listed as being a presenter in  
this session — he spoke in a Thursday session.)

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

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Phase I of an **Elsevier** "Library Connect" program was described. (Copies of the related white paper #1, "University investment in the library: What's the return? A case study at the University of Illinois at Urbana-Champaign," authored by **Luther**, were distributed and can be found at: [www.elsevier.com/wps/find/librarianshome.librarians/whitepapers](http://www.elsevier.com/wps/find/librarianshome.librarians/whitepapers)). **Luther** discussed points of interest — the quantity of a university's investment in its library, with a focus on the library's role. **Roger Strouse** published on ROI in *Information Outlook* (March 2003, "Demonstrating Value and Return on Investment: The Ongoing Imperative"). **Chrzastowski** spoke about her library's experiences, (representing the director) as one of the "village people," since "It takes a village." She commented on some outcomes ("references are vital to grants"), and emphasized that library budget figures, not the acquisitions portion, were required. One poignant surveyed faculty member comment: "I would leave this university if the library deteriorated to the point that I'm not competitive." **Tenopir** explained that Phase 2 extends across universities (each participating institution gets its own report), brings in more libraries, identified through **Elsevier's** representatives in various countries. Questions to be answered — does the survey work internationally, is it scalable, and will it meet the needs of provosts — can it be used as a budget argument? Some libraries, although willing, were unable to participate, if unable to provide the retrospective ten years of budget data.

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***The Charleston Conference Observatory – A Proposal***

— Presented by **David Nicholas** (Professor,  
University College London)

Reported by: **Heather Miller** (SUNY Albany)  
<h-miller@uamail.albany.edu>

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**Nicholas** urged the creation of a research adjunct to the conference where the best ideas from each conference could become research projects, developing an evidence base for strategic planning and informing future conference agendas and, consequently, becoming a major policy maker and influence in the field. It is an opportunity to build an international, interdisciplinary, common research community. He emphasized the need for large scale, longitudinal, comparative, strategic studies. Examples in the UK include **The EBook National Observatory**, a journal impact study and a **Google Generation** study. He noted that librarians are not natural researchers, but also pointed to these UK projects as sources of guidance. One question that should be asked is whether journal packages affect research outcomes and, consequently, what is the effect of a given price increase? In answer to questions, he noted that in order to do this leaders are needed from richer institutions who can contribute time and money. Funding can come after a small start. **Derek Law** pointed out that detailed case studies are also valuable and that the whole world is not represented at Charleston. It was suggested to see if research ideas could be collected via a wiki.

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***Academic Libraries in Sichuan, China: After the Quake***

— Presented by **Tony Ferguson** (University Librarian,  
University of Hong Kong)

Reported by: **Karla Chavois** (SLIS Student, University of South  
Carolina) <selahcat33@gmail.com>

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Books without homes, homes without books — this is the fate that libraries hope to avoid following the May 12, 2008 earthquakes that claimed thousands of lives and destroyed areas of China. Session speaker **Ferguson** described and showed some of the devastating effects of the earthquakes which left so many homeless, injured, orphaned, or otherwise affected. Slides of collapsed structures, libraries, and even tents as temporary staff quarters were pictured. **Ferguson** also discussed library specific aid programs already established and advised how we can donate and help. Libraries will need books, journals, access to electronic content, equipment, and staff training. Most informative was the checklist of plans we can use to learn from this incident by conducting drills, safety inspections, having emergency plans and sharing communication. While the session not interactive and had a quite formal tone, it addressed the dire plight of these libraries and served as a cautionary example for the creation of disaster preparedness plans for all contingencies.

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***The New Decameron: Tales of Blackwellians and Reading and Writing Folk***

— Presented by **Rita Ricketts** (Blackwell's  
Historian, Bodleian Visiting Scholar: Centre for the  
Study of the Book, Oxford University)

Reported by: **Melissa Hinton** (Long Island University, C.W.  
Post Campus) <Mellissa.Hinton@liu.edu>

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In a lively and entertaining discussion, historian and self-described “story teller,” **Ricketts**, delineated the history of **Blackwell's** from its humble beginnings to its modern role as international bookseller,

publisher, and philanthropist. Using as her source the treasure trove of the **Blackwell** archives housed at the **Bodleian**, and with an obvious adoration for her topic, she acknowledged the various “players” in the **Blackwell** history, including some not-so-obvious people such as wives, mothers, and girlfriends. This approach brings these people to life in the new century. She noted that the archives are filled with rich nuggets of material and cited as an example an early letter from **J.R.R. Tolkien** that demonstrates the extent of the **Blackwell** involvement with its writers. Another item in the archives pinpoints the American connection to 1846 when a catalog that was sent to an American dealer resulted in an order as evidenced by an invoice dated 1853. Plans to digitize the **Blackwell** archives, an obviously rich scholarly resource, are underway.

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***ONIX-PL: Linking Electronic Resources and their Licensing***

**Terms** — Presented by **Friedemann Weigel**, Moderator  
(Managing Partner, Director IT, Harrassowitz); **Bob Boissy**  
(Manager, Agent Relations, Springer); **Rick Burke** (Executive  
Director of SCELC, the Statewide Californian Electronic Library  
Consortium); **Brian Green** (Executive Director, EDItEUR)

Reported by: **Patrick Carr** (East Carolina University,  
Joyner Library) <carrp@ecu.edu>

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**ONIX for Publications Licenses (ONIX-PL)** is an XML format enabling a library's users and personal to view listings of the licensing terms of accessible e-journals and databases. **Green** began the session's discussion by providing background information on the standard. He explained that the **EDItEUR** group is developing **ONIX-PL** along with **OPLE**, an open source editing tool, to assist libraries in carrying out the increasingly difficult task of tracking and communicating e-resource licensing terms. He stated that the standard should be ready for general use by the end of 2008. **Burke** continued the discussion by describing the use of the **Serials Solutions** electronic resource management system of the **Statewide California Electronic Library Consortium (SCELC)** in order to test **ONIX-PL**. Next, **Boissy** offered a publisher's perspective on the standard. He highlighted the factors that should motivate publishers to participate in the standard and described **Springer's** experience using its license agreements to test the standard. Each presenter in the session agreed that **ONIX-PL** has the potential to enable librarians, publishers, subscription agents, and other stakeholders to more effectively address the complexities of e-resource management.

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***The Impact of BioOne Journal Packages*** — Presented by  
**Utishoor Salisbury** (Librarian/University Professor, University  
of Arkansas) — (Note: Co-presenter **Carolyn Mills** (Biology  
Librarian, University of Connecticut) was not present.)

Reported by: **Brett Barrie** (SLIS Student, University of South  
Carolina) <BARRIE@mailbox.sc.edu>

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**Mills**, who conducted the study alongside **Salisbury**, was unable to give her half of the presentation. Both halves of the presentation were covered by **Salisbury** and analyzed the various statistics of **BioOne** articles.

**BioOne** was launched in 2001 and developed by the **American Institute of Biological Sciences**, **SPARC**, and the **Big 12 Libraries**. It offers full text online access and offers navigation between journals from different societies. **BioOne** is offered in three different packages, **BioOne1**, **BioOne2**, and open access. It covers the life sciences, including agriculture, biology, zoology and botany. The packages are developed by aggregating content with regards to whether they were refereed, reviewed or indexed. More than half of **BioOne's** articles are indexed in more than seven databases. It was developed with cost effectiveness in mind and offers a pay per view option. The H index of **BioOne** is comparable to both **SCOPUS** and **Web of Science**.

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**Video – The Final Frontier?** — Presented by  
**Stephen Rhind-Tutt** (President, Alexander Street Press); **Deg Farrelly** (Associate Librarian, Arizona State University).

Reported by: **Jack Montgomery** (Western Kentucky University)  
<jack.montgomery@wku.edu>

**Rhind-Tutt** began this presentation by stating that video in the digital format has been developing for 40 years and is the final frontier of media development.

It is a physically dense, yet engaging medium that presents a radical new way to study, teach and learn. We must begin to understand that the video clip is now the standard way to view a digital work and indexing, once unavailable, is now becoming integrated into the presentations.

**Farrelly** then discussed the historical, legal and license issues surrounding the digital video presentation. He sees digital video as a key element in the asynchronous evolution of the general educational experience. Even as different forms of purchasing and licensing have evolved from we are still far removed from the simplicity of consistent pricing and delivery models, standardized licensing as well as one-stop shopping. In addition we have a major task in converting conventional video media into a digital format.

Librarians have a unique opportunity to be involved in the development of a new media-paradigm.

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**A Tale of Three Surveys: How Librarians, Faculty and Students Perceive and Use Electronic Resources** — Presented by  
**Allan McKeil** (Dean of Libraries, Western Oregon University)  
(*Changed from original title: Student's Perception of E-books*  
– *Survey Results and Discussion; Original Speaker:*  
**Kevin Sayer**, President, ebrary)

Reported by: **Ruth Connell** (Grasselli Library, John Carrol University) <connell@jcu.edu>

**ebrary** technology advisory board member **McKeil** provided an overview of three surveys on eBooks conducted by **ebrary**: one of librarians in the spring of 2007, one of faculty in fall of 2007, and one of students in the spring of 2008. The results of all are worth a look. **ebrary** has used them to determine what each group considers to be the most important elements of a successful eBook. Librarians look at price, the subject areas covered, the access model and the currency of the material. Faculty see the primary advantages of eBooks to be greater accessibility, greater usability, and less expense while students who use eBooks see their strengths as environmental friendliness, anytime-anywhere access, and ease of use. 82% of faculty and 83% of students who use eBooks find them as useful as or prefer them to print. Both groups admitted to preferring print for reading cover-to-cover. Students see a wider selection of titles in print and faculty members believe print is easier to access.

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## Concurrent Sessions 2 — Friday, November 7, 2008

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**Research Evaluation: Beyond Metrics to Understand** —  
Presented by **Patricia Brennan** (Product Manager,  
Thomson Reuters)

Reported by: **Cheryl S. McCoy** (University of South Florida)  
<cmccoy@lib.usf.edu>

The scholarship process is changing and role of journals in the scholarly communication process is also changing. Researchers are

becoming increasingly engaged in collaborative projects and the dispersion of authors is more widespread. Scholars and their institutions are using citation analysis and citation mapping to track the interaction between scholars and between institutions. It has become necessary for researchers/administrators, publishers, and libraries to make use of metrics to understand what these interactions mean.

Factors driving this change include: increased emphasis on evaluation and assessment; funding pressures (budgetary and research pressure); the efforts for promotion and tenure are moving to a more quantitative measure; cross collaboration within medical research publications is tied back to funds; the global competition in the sciences; the changing nature of scholarly journal publishing; and the open access mandates.

Ten rules in using publications and citation analysis:

1. Consider whether available data can address the questions
2. Choose publication type field definitions and years of data
3. Decide on whole or fractional counting
4. Judge whether data requires editing
5. Compare like with like
6. Use relative measures, not just the absolute counts
7. Obtain multiple measures
8. Recognize the skewed nature of citation data
9. Confirm that the data collected are relevant to the question
10. Ask whether the results are reasonable

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**We want more eBooks! Lessons Learned from Seven Years of Embedding Electronic Books into a UK University Library Collection** — Presented by **Kate Price** (E-Strategy & Resources Manager, University of Surrey)

Reported by: **Ruth Connell** (Grasselli Library, John Carrol University) <connell@jcu.edu>

From their first purchase of an eBook collection (**EngNet Base**) in 2001 through the 2007 additions of **JISC**, **Blackwell**, **Gale**, **Oxford**, and **Knovel** titles, electronic books have grown exponentially for this research library outside of London. In this case study, **Price** detailed the processes of planning and implementing their eBook collection. They dealt with selection of the titles, finding cataloging records and the impact of the electronic items on the cataloging workflow, and coping with package updates. They managed the influx of electronic titles without expanding their 1.5 professional cataloging staff. Usage statistics present their own problems; she downloads each package separately. The **University of Surrey** took part in a UK higher education survey on libraries. Their responses showed greater awareness of library materials and a high rate of continued use of the physical library.

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**If you want it, here it is come and get it ... Printing & Shipping Journal Issues On-Demand** — Presented by **Suzanne Wilson-Higgins** (Commercial Director EMEA, Lightning Source UK); **Beth Bernhardt** (Electronic Resources Librarian, UNC Greensboro)

Reported by: **Kate Latal** (University at Albany)  
<KLatal@uamail.albany.edu>

As **Wilson-Higgins** described, using a virtual inventory **Lightning Source (LS)** creates a print on demand (pod) copy in two days that is sent directly to the customer and is indistinguishable from the original print copy. Digital printing and electronic retailers made this viable. To adapt this process for journals, **LS** worked with three focus groups over 18 months to gather the needs and opinions of journal publishers. Pod provides advantages: no need to warehouse volumes, ability to print new copies of past volumes for new subscribers, and subscribers may opt for a print copy of an e-journal. Product aspects that differ from a traditional print journal, blank page inside covers and publishers' advertising needs, are being examined.

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**Bernhardt** detailed additional pod applications: self-publishing, substitute for ILL, produce print copy for one customer, and reprinting o.p. titles. The digital content serves as a form of preservation too. For print runs over a certain number, traditional printing is still cost effective. One attendee suggested reordering missing journal issues instead of claiming them. Future plans include listing their titles in an eBook catalog, printing eBooks, creating course material packets, if permission is granted by all parties, and on demand film and audio.

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**Data Mining, Advanced Collection Analysis, and Publisher Profiles: An Update on the OCLC Publisher Name Authority File** — Presented by **Timothy J. Dickey** (Post-Doctoral Researcher, OCLC); **Lynn Silipigni Connaway** (Senior Research Scientist, OCLC Research)

Reported by: **J. Michael Lindsay** (Preston Library, University of Tennessee) <jmlindsay@mc.utmck.edu>

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**Connaway** was unable to attend the conference, so **Dickey** was the sole presenter. The **OCLC** database, containing over 125 million records, contains a vast amount of information on books, including data on publishers, subjects, and non-English materials, but effective analysis of this data has proved elusive. This presentation reported on a data mining project undertaken by **OCLC** to profile publishers in their name authority database. The goals of the project were to arrive at authoritative publisher names, understand the common variants in publisher and place names, and draw out definitions for publishing entities. In addition, the researchers wanted to understand the hierarchical relationships between publishers; that is, to understand which imprints were parts of which publishers. The researchers faced challenges with these records due to varying cataloging practices, differing abbreviations, and due to errors and misspellings in the records. These challenges were overcome by pulling records based on ISBN prefixes, clustering the data, classifying similar objects into groups, and partitioning that data. A relational database was created, preserving the hierarchical relationships. The project resulted in a variety of reports including: lists of top university presses, publisher mergers and acquisitions, top US publishing entities by ISBN, and profiled the languages published materials are in. These results demonstrated a successful methodology, and pointed the way to continuing research.

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**Collection Analysis and Assessment: Finding the Best and Worst in the Library Collection** — Presented by Jennifer Arnold (Director of Library Services, Central Piedmont Community College, Charlotte, NC)

Reported by: **Linda Rousseau** (Charleston Southern University) <lrousseau@csuniv.edu>

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**Ms. Arnold** accomplished a yeoman's task in trying to present in one short session the process **CPC** experienced to upgrade their library collection. Fortunately, she provided an extensive slide presentation that could serve as an excellent guidebook to others contemplating weeding. **Ms. Arnold** explained that the evaluation of the collection resulted from a recommendation by the regional accreditation agency to update and upgrade the collection by weeding the older materials. As is usually the case, the libraries' mission is to support the curricular and program needs of **CPC**. According to **Ms. Arnold**, serious assessment of the collection had not occurred in years.

The highlights of the presentation were several: planning for weeding is absolutely essential to attain quality results; the process should also include the careful analysis of the sufficiency of the collection to support the curricular and programs needs of the institution; establish a reasonable timeframe and focus on weakest area(s) and communicate the rationale, intentions and results to an inclusive community of administrators, faculty, staff and students "...upfront and consistent[ly]..."

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**Microfilm as a Primary and Secondary Source** — Presented by **Tinker Massey** (Serials Librarian, Embry-Riddle Aeronautical University).

Reported by: **Kristine E. Mudrick** (Francis A. Drexel Library, Saint Joseph's University) <kmudrick@sju.edu>

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As **Massey** reminded the audience, the shelf-life of properly stored microfilm is 300 years. Microfilm is used as a backup for print journals, newspapers and documents, to free up shelf space, and to replace missing materials. Sometimes the cost of subscribing to the online version of a journal may be more costly than a library can afford for archival material. In special libraries, primary source materials are often microfilmed as a means of preservation. This microfilm provides a true photographic copy and also allows researchers to use materials without damaging the original paper documents. Lending or selling these microfilm copies extends access to off-site researchers. **Massey** also provided many practical tips, such as replacing rubber bands with acid-free wrappers and placing desiccation packets in storage drawers to absorb moisture, and she drew attention to the fact that a vinegar-like smell is a sign that microfilm is deteriorating. It was also noted that commercial vendors' reproduction and sales of a library's special collections materials may serve as a source of revenue for a library. Many libraries are investing in equipment so that the materials do not have to be removed from the premises during the reproduction process.

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**The Costs of Electronic Publishing** — Presented by **Chris Beckett** (VP Sales and Marketing, Atypion Systems)

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

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**Beckett** gave a "tour" of the processes that take place behind the scenes. At one point he indicated that publishers sometimes "have eyes bigger than their stomachs," but it might be argued that librarians and users too often have "pie in the sky" wish lists of features that may not be economically feasible, or, in the case of publishers, more than they can afford. There are capabilities and there is scalability. Using **Atypion** as an example, he shared insights and experience about issues: production, discoverability, marketing, and "business intelligence" (reports). His comment, that inventive promoting (by publishers) becomes complicated for libraries, probably resonated with librarians in the audience. New features that are coming soon (or already here): sharing, analysis of information, new forms of communication, international distribution (**DataVerse Project**), data analysis (**SETHI Project**). What is it the "version of record" or, as **Sally Morris** calls it, the "evolving agglomeration." In the question session, costs were mentioned outright — costs do not really drop in electronic publishing, because there are staff costs involved in building increasingly complex systems. We figured journals out some time ago, but "it all hasn't shaken out in the book space yet"...A colorful wheel graphic, depicting electronic production proved to be popular enough to receive requests on its availability.

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**Closing the Loop: Making Collections Relevant through Assessment** — Presented by **Teri Koch** (Head, Collection Development, Drake University); **M. Sara Lowe** (Electronic Resources Specialist, Drake University)

Reported by: **Rita M. Cauce** (Florida International University, Green Library) <caucer@fiu.edu>

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This presentation provided a case study of **Drake University's Cowles Library** assessment program. Academic libraries must demonstrate the value of their collections in order to maintain funding, and this is done by purchasing high-quality materials patrons will use, and so proving their value. The speakers showed how closing this loop with ongoing assessment can greatly benefit the library by providing a higher

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level of accountability and relevance. Through assessment, this library was successful in securing a portion of the IT fee charged to students, which is used to purchase new resources.

As part of their assessment, the Collection Development Committee carried out a monograph and a serials analysis. The serials analysis concentrated on a print to online migration, where the first stage involved removing print serials for which they had perpetual access. The committee gathered information from **WorldCat Analysis** and **Ulrich's** and the library liaisons worked with department liaisons in reviewing the information, such as title lists, online availability, perpetual access, etc. They kept a blog where faculty could comment on cancellation decisions. The serials analysis resulted in \$20,000 savings in their print to online migration, and an additional \$28,000 savings by cancelling microform subscriptions (when duplicated in other formats) and newspaper cancellations. The monograph analysis consisted in using **WorldCat Collection Analysis** and running brief tests of the collection against other libraries. The resulting collection levels were compared against the library's conspectus level and resulted in evidence as to where they could cut back in acquisitions and where they needed to be more active.

As part of their ongoing analysis, **Scholarly Stats** is used for usage statistics and cost-per-use analyses are done monthly. This information is fed back into the loop: assessment tools, library repositories, acquisitions budget (includes IT fee), purchase, assessment tools, etc.

Currently the IT fee is 20% of their acquisitions budget, up from 5% when this process started in 2002. The IT fee is used mainly for electronic databases, simplifying the Library Dean's reporting of how these funds are used.

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**Developing a Unified Metadata Retrieval Standard for Library Systems** — Presented by **Corrie Marsh, Moderator** (Associate University Librarian, Hong Kong University of Science and Technology); **Andreas Biedenbach** (eProduct Manager Data Systems & Quality, Springer Science + Business Media); **Maria Keller** (Director of Editorial Control, Serials Solutions)

Reported by: **Miranda Schenkel** (SLIS Student, University of South Carolina) <schenkem@mailbox.sc.edu>

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**Biedenbach** and **Keller** offered the perspectives of a publisher and an access provider on metadata and it was very insightful to think about metadata from a non-librarian viewpoint. It opened my eyes to how many different standards are currently being used in the fields of digital preservation, document delivery, cataloguing records, agencies and booksellers, search engines, and local loading. Besides the different fields of use for metadata, not everyone wants the same set of metadata, delivery method, or range of data, nor does everyone receive metadata based on the same data architecture. However, there are a few initiatives, like **KBART**, that are attempting to make unified data flows a possibility. No conclusions were posited, but it was a call of awareness: although one standard doesn't allow for individual preferences, it would allow information to flow much more fluidly.

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**National Science and Technology Library of China: Leading the Way in Technical Information Resource Collection** — Presented by **Mr. Jiancheng Zheng** (Vice Director of Collection Development Department, National Science and Technology Library, China)

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

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The fascination with the Chinese library and publishing scene was evidenced by the variety of attendees-librarians (a few originally from China), publishers (some already working with Chinese libraries, some investigating the possibilities). Not indicated in the program, and initially a bit confusing to newbies in this area, was the presence of two additional persons who joined speaker **Zheng** at the front of the room. They were from Philadelphia-headquartered **Charlesworth Group** (service/marketing agents for China). CEO **Adrian Stanley** provided background information and Marketing Coordinator **Dan Yang** served as an "ad hoc" translator, when one was needed, but by and large **Zheng's** detailed presentation on its own merit provided a thorough overview of the complex structures that make up the NSTL — the nine academies/institutes, the decision-making council, two expert committees. NSTL concentrates primarily on STM. Print collecting still takes place but the current priorities are digital and preservation issues. Licenses with international publishers are crafted carefully, keeping in mind the responsibilities and rights of publishers, providers, and preservers. The Q&A segment raised comments, e.g., "we must guarantee access no matter what happens," analogous to a "Chinese Portico" (natural disasters cause breakdowns in communication networks with the world, "tsunami trigger events"). It was also clarified that NSTL is a government body focused on STM, but there other private consortia exist, such as **CALIS (China Academic Library and Information System)**, consisting of over 100 members and largely focused on humanities and literature.

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**Developing a Library Collection Development Allocation** — Presented by **Jeff Bailey** (Assistant Library Director, Arkansas State University); **Linda Creibaum** (Acquisitions Librarian, Arkansas State University)

Reported by: **Rita M. Cauce** (Florida International University, Green Library) <caucer@fiu.edu>

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Deciding on how to allocate the library's resource budget across the university's programs is a topic of much debate in collection development departments. In this presentation the speakers described the formula used by **Arkansas State University** to distribute funds throughout the academic departments.

**Arkansas State University** has approximately 10,000 students, five PhD programs, and is experimenting rapid growth. The library does not have a book approval plan. Prior to using an allocation formula, almost 30% of the collection development expenditure was going to one department, mainly to journals. Funds had not been redistributed in many years. A task force was created to research current use of allocation formulas. The decision was made to base their formula on the one used by **Colorado State University**, and to run a single formula for books and journals. The factors used in the formula: semester credit hour production (actual enrollment), number of classes offered, degrees awarded and their levels, number of faculty per department, average cost of materials.

Before the formula is applied to the available budget, funds are set aside to cover interdisciplinary databases and other general library expenditures. Academic programs are advised as to how much of their allocation is needed to continue their current recurring costs and it is up to them to discontinue any they would rather not continue funding. The added benefit to this process is the active participation of the departments

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in collection development, including review of recurring costs.

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**The E-book Challenge: From Start to Finish, and Beyond**  
— Presented by **David Hellman** (Collection Development Coordinator, San Francisco State University); **Ya Wang** (Electronic Collections Coordinator, SFSU); **Jay Henry** (Director, Business Development, Blackwell Book Services)

Reported by: **Christine Ross** (University of Illinois at Springfield) <cmross1@uis.edu>

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This presentation offered **San Francisco State's E-Book Acquisition Project** as an example of steps and possible pitfalls that other libraries may want to follow and avoid when embarking upon their own E-Book acquisition endeavor. The first speaker laid the groundwork as to why the college decided to start purchasing eBooks. Then the presentation became much more subjective and less informative as each of the technical steps, specific to this college's ILS, were outlined in meticulous detail. The presentation wrapped up with questions for the eBook rep and the panel. While it was a learning experience for the staff of **San Francisco State**, the audience may not have walked away with much useful information.

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**Here Today, Gone Tomorrow? New Models for Preserving Electronic Scholarship** — Presented by **Eileen Fenton** (Executive Director, Portico); **Daviess Menefee** (Director, Library Relations, Elsevier); **Els van Eijck van Heslinga** (Program Development Manager); **Elizabeth Dulabahn** (Director of Integration Management, Office of Strategic Initiatives, National Infrastructure Information Preservation Program, Library of Congress)

Reported by: **Cheryl S. McCoy** (University of South Florida) <cmccoy@lib.usf.edu>

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Digital preservation is not simply reformatting from print to digital or providing byte storage to back up print resources. It is necessary to think beyond current practices because long-term success of digital preservation will require cooperation in order to assure enduring content that has discoverability, authenticity, usability, and accessibility.

**Who will be involved?**

Will international collaboration be needed (or possible) to address the growing digital preservation challenge? We are saving the output of our own country on web sites but we are losing access to other valuable collections, particularly statistics. The **Library of Congress** has established exchange programs with foreign countries in order to obtain publications but time zone differences, international calls, transfer of monies, etc. make it hard to share funding resources.

**How will preservation activities be organized and distributed?**

How can preservation work be distributed? What preservation work must be done locally? Which preservation tasks can be distributed? Concrete proposals will be put on the table to discuss the subject and will focus on layers — the standards, the content space, and the problems involved in keeping it together. No one has the answer at this point. What are the key digital preservation challenges and opportunities that face publishers, libraries, and archives as we look ahead 5, 10, 50 years?

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**The Role of More Accurate Acquisitions Data in the Shift from Print to Digital Format** — Presented by **Sarah Pomerantz** (Acquisitions Librarian, Adelphi University); **Andrew White** (Associate Dean, Adelphi University)

Reported by: **Meg Atkinson** (SLIS Student, University of South Carolina) <margaret.atkinson@comcast.net>

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**Adelphi University** is a medium-sized, liberal arts institution in Garden City, NJ with three satellite campuses. There are libraries at all four sites, nearly 650,000 volumes, 805 microforms, 27,000 AV materials, over 30,000 electronic journal titles, and 165 databases. When **Pomerantz** began her position at **AU**, she noticed that since the Acquisitions structure had been created quite a few years before, there had been a shift in information formats from print to electronic. Among other things, there was quite a bit of redundancy present in the old form types and there was a lack of consistent placement for digital materials within the old fund accounts. **Pomerantz** realized that there needed to be a complete overhaul of the Acquisitions module and took her recommendations to **White**. The importance of accurate financial data is to have knowledge of available funds, being able to track encumbrances, and to anticipate annual expenses for renewals. Accurate data provides financial statistics, budget management, and accountability and justification. All fund codes had to be collapsed and then blown back out so that they would not only correspond to the new library fund accounts, but with university accounts as well. Under the new structure, acquisition data has improved with clearly defined fund account codes, subscriptions are encumbered, digital collection resources are paid in acquisitions, and codes now exist for digital resources. Future considerations for this project are reporting with proper assignment of HEGIS codes, prediction of FY needs based on annual renewal costs, and a shift in funds from firm orders to digital renewals for eBook access models.

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**A Far, Far Better Place: Adapting to Change in Technical Services** — Presented by **Laura Kinner** (Director of Technical Services, The University of Toledo); **Alice Crosetto** (Coordinator, Collection Development, University of Toledo); **Lucy Duhon** (Coordinator of Electronic Resources/Serials Librarian, University of Toledo)

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

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The three presenters used clever illustrations to the delight of the attendees who filled the room beyond capacity. According to **Crosetto**, technical services experienced the worst of times in recent years due to staff and budget reductions, coupled with increasingly complex work, technological changes, and a more team focused, less hierarchical environment. Recognize that staff may reflect characteristics unique to their generation: Silent Generation, Baby Boomer, Generation X, and Millennial. As **Duhon** noted, technical services faces the dual challenge of an aging workforce and changing technology. Know your staff in order to use their talents and abilities wisely and to move and retrain staff. Libraries must provide current content to keep the library relevant to its educated, mobile, and diverse users. Technical services must innovate and take part in the ongoing changes, advocate for the library, listen to younger staff and incorporate the wisdom of seasoned employees, collect input from users and be visible. **Kinner** recommended planning for the future: involve all groups; create a time line; require mutual respect; let all be heard; include succession planning; blend contributions from each group; gather data and analyze it; get rid of the old and move forward.

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**New Platforms for Delivering and Distributing Content**

— Presented by **Linda Vendryes** (VP, Channel Development, Ingram Digital)

(The originally scheduled speaker was **Rich Rosy**, VP & GM, Institutional Solutions, Ingram Digital)

Reported by: **Cathy Green** (SLIS Student, University of South Carolina) <greenca@mailbox.sc.edu>

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Librarians have several options for getting content, across a variety of providers and platforms. **Vendryes** identified six options, with an analysis of their strengths and weaknesses. Publisher direct can offer the best price, brand and subject coverage but with limited content and need to buy all for the best price. Journal aggregators have a single point of entry, strong metadata and the biggest bang for the buck. Distributors provide physical and electronic access and acquisition, with standing orders, but can be focused on print delivery. eBook aggregators present a single search platform with multiple publishers, flexible pricing and limited subject access. Federated search tools can be tough to implement successfully, with great theory but poor execution and technical limitations. Search engines have good name recognition and wide acceptance, with endless search both a plus and minus, and the issue of providing a democratic search interface vs. accommodating smart users. **Vendryes** concluded with a discussion of library and publisher trends, including expansion of user access and offerings (while not expanding shelf space), more flexible pricing models, eBook support for user annotations, and the effect of digital rights management (DRM) techniques like flow control on access.

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**Plenary Session — Friday, November 7, 2008**

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**OA Exposed!** — Presented by **Arend Kuester**, Moderator

(Director, PCG Europe); **Ralf Schimmer** (Head of the Department of Scientific Information, Max Planck Digital Library); **Richard Luce** (Emory University); **Wim van der Stelt** (Executive Vice President Business Development, Springer);

**David Hoole** (Head of Brand Marketing and Content Licensing, Nature Publishing Group)

(Substitute speaker: **Charles “Chuck” Eckman** (Associate University Librarian & Director of Collections, University of California—Berkeley attended instead of **Ralf Schimmer**.)

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

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Moderator **Kuester** began by reading comments from **Schimmer** who could not attend and urged publishers to look at OA as an opportunity and not to fear the financial impact. **Eckman** talked about **Berkeley’s BRII (Berkeley Research Impact Initiative)** pilot project co-sponsored by **UC Berkeley’s** Vice Chancellor for Research and the University Librarian. **BRII** variably subsidizes author fees toward OA publications to support campus researchers who want to make their journal articles free to all readers immediately upon publication. **Eckman** considers such support in line with libraries’ public service mission. **Hoole** reported that **NPG** is exploring ways to make archiving automatic for its authors and wondered if scholars could get the benefits of text-mining from pre-pubs. He also thought that the business of publishing cannot be ignored. **Luce** called for support of experiments like **SCOAP3** (Sponsoring Consortium for Open Access Publishing in Particle Physics), which supports OA publishing in high-energy physics. **Van der Stelt** thought libraries can and ought to do more to help authors

self-archive. He also offered that Springer acquired BioMed Central to support OA in the life sciences with a proven venture. Q&A was lively, including a question about whether all published research might become freely available eventually. Publishers in the room said no—that the editorial process in particular adds value to the research.

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**Sessions — Saturday, November 8, 2008**

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**Genius at Work: Top 10 Ideas I Heard (and can copy) at the 28th Annual Charleston Conference** — Presented by **Tony Ferguson** (University Librarian, University of Hong Kong)

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

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**Ferguson** shared 2008 conference “cool bits of information” and “ideas to copy” that resonated with the audience (those not in Charleston may miss the context). On his “cool” list: The staff will change... (Push, pull them, or are they wet noodles?). Insert “2.0” in as many sentences as possible. When in doubt, practice “digital overlap therapy.” Software, policies, etc. aren’t “user-friendly” when people need training to use them. American libraries have finally decided that eBooks will work. Scholars’ communication seems to be reaching the tipping point, sufficient to make a difference in tenure decisions (a foundation for what libraries are doing). **Microsoft** is moving software into the “cloud,” while **OCLC** plans to move OPAC software there... On **Ferguson’s** “copy ideas” list: Overseas-based folks can use work-around solutions to purchase books online (**amazon.com** U.S. dollar gift certificates). Employ case studies using primary source materials to teach research skills in news and other sources. “Resources aren’t postage stamps,” so “drag people through them.” Post-**Google** agreement: rethink ILL, remote storage. Brainstorm how to regain the trust of students and faculty. Stop teaching information management skills; start teaching textual critical thinking skills. Participate in **Elsevier’s** (funded) ROI study. Promote the single box search option. Today’s students prize informality and “almost is good enough”...

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**Converging on Persistence: Steps to an Ecology of Long-Lived Collections** — Presented by **Brian E. C. Schottlaender**

(The Audrey Geisel University Librarian, University of California San Diego)

Reported by: **Heather Miller** (SUNY Albany) <h-miller@uamail.albany.edu>

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Collections are more and more about what an individual library owns (as opposed to what can be accessed). Thus, preservation is imperative; it is also complex, based as it is on trust. **Schottlaender** noted that **OCLC’s Lorcan Dempsey’s** focus is on collective, system wide perspectives and the **Association of Research Libraries** emphasizes strong preservation programs. **Schottlaender** focused on shared facilities, distinguishing between shared repositories and shared collections. In the latter, all decisions are collective. The **University of California** shared collection is a shared distributed collection in which ownership remains with the library while the collection is collectively managed. Trust becomes more complex in varied shared environments such as these and should be formalized in written agreements. He noted also that of the 68 shared high density library storage facilities in North America only 14 are shared and pointed to the **Center for Research Libraries** as the “granddaddy” of cooperative, shared storage which expanded to shared acquisitions, cataloging and delivery as well. He referred listeners to **Michèle Cloonan’s** article “The Moral Imperative to Preserve,” *Library Trends* (Winter 2007) and **Amy Friedlander’s** “Averting a Digital Katrina: Sustaining Trust in the Research Infrastructure,” *Educause Review* (July/Aug. 2008).

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**Introduction for Innovation Sessions** — Presented by  
**JoAnne Sparks** (Assistant Director for Research and Learning  
Services, Bodleian Library, University of Oxford)

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

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In 2007 **Sparks** shared examples of innovative measures that she and colleagues had implemented at her previous place of employment at the **Memorial Sloan-Kettering Cancer Center** in New York City. Recently transplanted to the U.K., for the “second annual” **Charleston Conference** “Saturday morning of innovation” in 2008, **Sparks** began her short introductory comments by sharing various definitions of innovation: describing something realized anew; a rediscovery applied in a new or extended way; direct connection with highly valued traditions and provision of “new directions.” **Sparks** expressed her admiration for architect **Christopher Alexander** and his “pattern language” ideas for home design, and shared how she has attempted to incorporate them into her new life in an English garden house. To illustrate the many innovations that can be found in the library and information world, **Sparks** showed her own creation, a “desktop of logos” that she had pulled together (and created), innovative “cool know bits”: ILS-2, creating a library portal in Blackboard, trigger events, consultations, “**Google Gap**,” access and access, the omnipresent Web, etc.

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#### **Innovation Session 1— Saturday, November 8, 2008**

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**Academic Libraries without Print** — Presented by **Allen McKiel** (Dean of Library and Media Services, Western Oregon University); **Carol Zsulya** (Head of Access and Distant Library Services, Cleveland State University); **Jim Dooley** (Head, Collection Services, University of California, Merced); **Robert Murdock** (Assistant University Librarian for Collection Development & Technical Services, Brigham Young University)

Reported by: **Ryan Weir** (University Libraries, Murray State University) <ryan.weir@murraystate.edu>

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Imagine a library without print resources. What would such a library look like and how would it function? During the forty minute session, three innovative leaders spoke about their libraries. **Dooley** discussed his library where the idea of the computer lab has been scrapped for a collection of 250 laptops that are available for checkout, and 90% of their resources are only in electronic format. **Murdock** spoke about his library’s move from a collection comprised of mainly print materials to one that now includes online journals, databases, eBooks, and print on demand journal services. **Zsulya** shared her library’s experiences as they started moving their collection to online formats in early 2001. Between 2001 and 2007, her library has moved from spending 37% of their budget on online resources to 67%. This presentation provided guidance and perspective for the national trend of academic libraries moving towards offering more online content. This session offered insight into three different libraries at three different stages of this process, as well as, practical information and ideas, to help get your library further along the path to a larger electronic collection.

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**The Evolution of Service: A Technical Services Perspective** — Presented by **Helen Heinrich** (Cataloging Coordinator, California State University, Northridge); **Donna LaFollette** (Accounting & Receiving Supervisor, California State University, Northridge)

Reported by: **Meg Atkinson** (SLIS Student, University of South Carolina) <margaret.atkinson@comcast.net>

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Faced with the problem of shrinking technical services resources, the Cataloging Coordinator at **Oviatt Library** at **C-SUN** had to decide how to balance user expectations with the price of service. Changes in the workflow were needed and **Heinrich** implemented five components to make it happen: review, revise, reorganize, technology, and collaboration. In the review process, staff members were interviewed, there was an internal and external review, and a cost analysis was completed. Procedures were then revised to reduced duplication and eliminate unnecessary tasks. Quality standards were modified to reflect current reality and cross-training was provided. During reorganization functions were consolidated, communication was reinforced, and fragmentation within the department was eliminated. Staff was encouraged to trust in their colleagues’ expertise by changing the expectation from that of a mistake to that of correctness. Leveraging technology to their advantage, they enabled cross-portal searching, automated repetitive editing, and purchased needed equipment. By collaborating with vendors, they were able to implement the open URL system needed for cross-portal searching, changed their output record profile, and began using **Prompt-Cat** for automated copy-cataloging. The ongoing reorganization has had positive results thus far. They were able to “cut the fat” without sacrificing service to users.

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**Innovating with Purpose: Think Global, Act Local, and Then Give Back** — Presented by **Rachel Frick** (Senior Program Officer, Institute of Museum and Library Services); **Elisabeth Leonard** (President, Library Solutions)

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

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**Frick** and **Leonard** were innovation cheerleaders, rotating their turns to comment, sharing examples from the “real library world.” Do an environmental scan and gather what is our new context-locally and trans-nationally, in the cyberinfrastructure. What’s changing in our favor? Our approach to assessment; librarian entrepreneurs; the glut of information, grants that call for scientists to share data and they don’t know how, new librarians with new ideas and fresh perspectives. The gardening metaphor: prepare the soil, seed the field, let the flowers bloom, realize that not every seed will germinate, feel the love. Innovation thrives when managers foster and reward it and promote risk-taking. Don’t talk only to librarians. The call to action? We need to solve problems, not offer solutions; collaborate more and do it more transparently, think “radical innovation,” not just incremental. Innovation should not be on the ashes of librarianship, but on its fundamentals. Session attendees had many questions and comments that continued the rallying cry—“Don’t forget the basics.” “Look at examples for models in innovation, but not actual applications.” “Innovation requires an investment of time, so dip your toe in.” “Manage by exception rather than by demand.” Let us “truly embed ourselves.” “Back to the bibliographer,” “Preservation mandate.”

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### Innovation Session 2 — Saturday, November 8, 2008

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**Bridging the Google Gap** — Presented by **Darrell Gunter**, Moderator (Chief Marketing Officer, Collexis Holdings, Inc.); **Dennis Brunning** (Electronic Resources Manager, Arizona State University); **Sue Polanka** (Head, Reference and Instruction, Paul Laurence Dunbar Library, Wright State University); **Steve Leicht** (COO, Collexis Holdings, Inc.); **Mark Hyer** (Vice President, Science and Technology Publishing, ProQuest)

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

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Each speaker shared insights on **Gunter's** posed questions: what users require and what currently is innovative. **Leicht**: Sometimes innovation only requires one little step, and the challenge is to use tools better. The “**Google** gap” won’t be bridged, since we won’t see the bridge. Faculty communities require: social networking applications, expert and institutional profiles, access to publications faculty wrote in the course of their careers. **Brunning**: The IR enhances a relationship of researchers with librarians, the library has a role in licensed content, publishing management includes dollars, enhance beyond the property, go beyond the search, leverage meta-data. **Hyer**: Need enhanced abstract records and access to tables and figures (information isn’t always in captions); keep company secrets until release date (a free social networking tool is forthcoming?). **Polanka**: Users require an “easy button” (find, not search), “my library,” discovery layers (pre-index, facet, with complete “2.0” over the top). In answer to the moderator posed question — “Is **Google** a friend or foe?,” panelists shared their views: **Google** is an enabler — Students will find it in **Google**, then make sense of it elsewhere. **Google** can complement other activities: a link resolver can be put into **Google** searches, links to **Google Books** can be placed in ILS records, offer a credit class “**Google** and the Library,” Library Guides 2.0 is a good investment; **ProQuest** microfilms will surface in **Google**.

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### Innovation Session 3— Saturday, November 8, 2008

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**Using Blog Technology to Get Their Attention** — Presented by **Audrey Powers** (Associate Librarian, Research Services & Collections, University of South Florida); **Cheryl McCoy** (University of South Florida); **Gina Clifford** (Webmaster, Tampa Campus Library, University of South Florida); **Sue Polanka** (Head, Reference and Instruction, Paul Laurence Dunbar Library, Wright State University)  
(Note: Listed speaker, **Phil Flynn** (Engineering Librarian, Wright State University) did not present.)

Reported by: **Cordelia Wilson** (SLIS Student, University of South Carolina) <Wilson29209@aol.com>

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**Polanka** shared her experiences in starting, maintaining, and marketing her blog *No Shelf Required*, [www.libraries.wright.edu/noshelfrequired/](http://www.libraries.wright.edu/noshelfrequired/). Her blog, which is geared toward publishers and librarians, is meant to initiate discussion on eBooks. **Polanka** highlighted several features of her blog, including polls and podcasts of interviews.

Librarians **Powers** and **McCoy** discussed at length the background of the blogs they created (*STM NEWS@USF Libraries*, *usflibraries.typepad.com/stmnews/* and *CVPA NEWS@USF Libraries*, *usflibraries.*

*typepad.com/arts/*) to keep the faculty in the sciences and arts at their university informed of newly added library resources and other news. They also went into the benefits of their blogs, including the enhanced ability to communicate collection development initiatives to appropriate faculty. In addition, they described the challenges associated with the blogs, such as the difficulty in getting others to post. Finally, **Powers** and **McCoy** demonstrated features of the two blogs.

At the conclusion, **Clifford** compared the capabilities and features of three popular hosted blog options — *Blogger.Com*, *Word Press.Com*, and *TypePad.Com*. She considered the level of IT expertise required for each. Next, she offered advice about principles to follow when designing and organizing blogs. **Clifford** also recommended strategies to optimize a blog’s ranking by search engines.

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**Hyde Park Corner Sound-Off** — Presented by **Chuck Hamaker** (UNC-Charlotte) and **Katina Strauch** (College of Charleston)

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

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In this annual **Charleston Conference** session, **Hamaker** and **Strauch** involved sound-off session attendees in a 2008 conference recap (until hotel employees began re-arranging chairs for another event). Speakers identified themselves, voiced opinions. “Lively Lunches” were proclaimed to be lively again and even a “not a morning person” enjoyed the “Beastly Breakfast.” New “dine-arounds” and “vendor chats” received mixed reviews, but votes to “try again next year.” Conference sessions organized by subject “threads” received a thumbs-up. Of interest: what is the (plenary/concurrent session) selection process “behind the scenes?” The first plenary session (by **Derek Law**) “set the tone”; other plenaries were deemed to be “good, but not exciting or provocative.” Some decreed: too much duplication and concurrent session overlap. First-timers enjoyed small group discussions on practical matters, specifics. Trends and “hot in 2008” topics: re-surfacing of pure citation analysis (to judge individuals); differentiating activities best done at local and regional levels; “how to spend less with more,” eBooks, and statistics... The conference is: democratic, an opportunity to meet people & network. It breaks down barriers with vendors, broadens horizons, engenders “ideas that are yet to be born in my mind,” and it is a “crime not to come each year.” One attendee was a “**Katina** and **Chuck** groupie” who comes each year. Conference Website administrators’ reminders: stay connected throughout the year, share photographs, “hassle” speakers to send their presentations... 🍷

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*This concludes the reports we received from the 2008 Charleston Conference. For information about the 2009 Charleston Conference visit the Charleston Conference Website at [www.katina.info/conference](http://www.katina.info/conference).*