Trends in Health Sciences and Biomedical Sciences Information and Services Provision

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

The overarching title for this Against the Grain (ATG) special issue builds on the titles used for the Nov. 2008 and Dec. 2011-Jan. 2012 special issues. Adding the concept of “services” to this special issue’s title serves as a reminder that “if you build it,” they (users) will not necessarily come (paraphrasing a phrase voiced in the movie, Field of Dreams). “Services,” as used in this context, incorporate the necessary activities of marketing, training, partnering, and collaborating. This ATG special issue includes seven contributions by experienced authors who share insights and their own experiences. They address current trends and opportunities addressed or undertaken by those who work with persons involved in the triad of patient care, education, and research, and beyond. Hopefully, all of the articles will have elements that resonate with ATG readers or pique their interest.

Without a doubt, those who work in the health and biomedical sciences information sector are familiar with phrases such as “global health” or “one health.” The second was selected as the theme of the historic 2013 annual meeting of the Medical Library Association (MLA) and its partners in Boston, MA. The National Program Committee (NPC) worked for three years to create a federated international meeting incorporating the 2013 Annual Meeting and Exhibition of MLA, the 11th International Congress on Medical Librarianship (ICML), the 7th International Conference of Animal Health Information Specialists (ICAHIS), and the 6th International Clinical Librarian Conference (ICLC). The onsite report of the 2013 meeting recorded representatives from 46 countries. In the 2011/2012 special issue of ATG, staff from the U.S. National Library of Medicine (NLM) shared examples of information innovation, often with a global focus. Although most librarians are not qualified to offer clinical medical assistance in global health initiatives or after international disasters, there are other ways for librarians to act globally, by participating in the initiatives of NLM, their institutions, or their professional associations. Many health sciences librarians belong to the MLA, a professional association that has never focused on only one country. The International Cooperation Section of MLA celebrates its 25th anniversary in 2014. As T. Mark Hodges wrote in the section history posted in the MLA Website, (http://www.mlanet.org/archive/history/uniti-history/ international.html), “…although ICS was only founded in 1989, its antecedents go back to the earliest years of the association and are an integral part of the history of the section. From the outset, the MLA has had an interna-

If Rumors Were Horses

The wonderfully cheerful Eileen Lawrence (have you ever seen her frown?) tells us that her hard-working colleague Jenni Wilson has left Alexander Street Press for a new career adventure. They have begun the hiring process. In the meantime, Mary Siegel will be handling Jenni’s accounts, <siegel@alexanderstreet.com> or 800-889-5937 ext. 903. The position is posted at: http://alexanderstreet.com/careers/regional-sales-manager-us, and information about working at Alexander Street Press is at http://alexanderstreet.com/careers.

Heard from Hendrik Edelman the other day. He was in Florida for a funeral and then popped in to Charleston for the Family Circle Cup, the big tennis match on Daniel Island. I did not see Hendrik unfortunately but he was in touch with Julie Arnheim who as we all know is living in Charleston and lives on Pitt Street behind the Addlestone Library and working with yours truly. Hendrik says they enjoyed the tournament and the weather so much that they plan to return. Maybe we will hook up next year?

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**Against the Grain** (USPS 012-618) is published six times a year in February, April, June, September, November, and December-January by Against the Grain, LLC, 209 Richardson Ave., MSC 98, The Citadel, Charleston, SC 29409. Subscription price per year is $50 U.S. ($60 Canada, $85 foreign, payable in U.S. dollars). Periodicals postage paid at Charleston, SC. **Postmaster:** Send change of address to Against the Grain, LLC, 209 Richardson Ave., MSC 98, The Citadel, Charleston, SC 29409. All rights reserved. Printed in the United States of America. Authors' opinions are to be regarded as their own. All materials are indexed in **The Informed Librarian** Library Literature, **LISA**, **Bowles & Carver**, Old English Cuts & Illustrations. The Chap Book Style.

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One reason I haven’t retired is that I can’t figure out what I would do with all my time. But I now know, I can go to nursing school. I know there is a shortage! Have been spending some time in hospitals and there are many great role models. But when I wasn’t reading, I was pursuing the occupation of editing Against the Grain.

This is easy when you have a guest editor like Ramune Kubilius who has put together a series of papers on Trends in Health Science and Biomedical Sciences Information Services Provision. Besides and an introduction by Ramune, we have papers by Carla J. Funk, J. Michael Homan, Lenny Rhine, Mary A. Hyde, Lisa A. Palmer, Anneliese Taylor, Susan K. Kendall, Elizabeth R. Lorbeer, and Michelle A. Kraft. In our Op Ed for this issue Mark Herring talks about the Google Book Decision while Tony Ferguson talks about paradise in his Back Talk column. We have interviews with Neil Blair Christensen and Francis Pinter and plenty of profiles to read as well. Tom Gilson and Debbie Vaughn have done their usual great reviewing jobs. We have Bill Hannay’s Legally Speaking column and Lolly’s answers to more questions.

There are some random ramblings, a discussion of consortial DDA, some things we need to know about engineering handbooks and computing instructions manuals, and Donna Jacobs says we should not judge a movie by its book, and there’s lot more.

Patient is now asking for me to find another book to read. I just finished reading him Laura Hillenbrand’s Unbroken: A World War II Story of Survival, Resilience, and Redemption. Maybe next is Sea! (sic)

Meanwhile, back to you in June and on the ATG Website! Happy Spring!

Love, Yr. Ed.

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The weather has finally gotten reasonable in Charleston after three months of nothing but cold rain and clouds, no sun. It’s now finally spring, running ready for the trying Charleston summer. But I have been playing nursemaid, taking care of my husband who had an operation a few weeks ago. I have been running errands, cooking and cleaning.

Had planned to go to the 16th Fiesole Retreat in Cambridge England but the doctor called instead. The Retreat has just ended and what a spectacular event it was. The weather in Cambridge was delightful and so were the presentations. Watch for them shortly on the Casalini Website www.casalini.it.

Speaking of the Fiesole Retreats and Cambridge. Our second Retreat was in Oxford (2000). An Oxford name from the past! Philip Blackwell is now CEO of Scolium Group Pte. Memories. Philip trained as a bookseller and publisher before completing an MBA at London Business School in 1996. After four years as a strategy consultant with Cap Gemini, he became chief executive officer of Blackwell Publishing (Holdings) Limited in 2000 until 2006. In 2002 he became a director of Blackwell Library Development Board and the Google publisher content advisory board, and is a trustee of the Royal Green Jackets Museum in Winchester. As we all know, the Blackwell family has owned rare and antiquarian book-dealing businesses for over 100 years. Read many of Rita Rickett’s tales of the Blackwell businesses in Against the Grain. https://www.linkedin.com/

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Letters to the Editor

Send letters to <kstrauch@comcast.net>, phone or fax 843-723-3536, or snail mail: Against the Grain, MSC 98, The Citadel, Charleston, SC 29409. You can also send a letter to the editor from the ATG Homepage at http://www.against-the-grain.com.

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Dear Editor:

Re: Nancy Herther article on the ATG NewsChannel (http://www.against-the-grain.com/2014/03/newsflash-celebrating-10-years-scoopuss-announces-major-archival-expansion-program/) Many congratulations to Nancy Herther on putting together such an informative article. These are very exciting times to be around in publishing, and I look forward to a future opportunity to bring the challenging work of the SCOPUS Content Advisory Board to a wider audience through your ATG NewsChannel newsletter.

With Best Wishes,

David Rew, TD MA MChir FRCS Consultant, Surgeon University Hospital of Southampton <DavidRew rew@soton.ac.uk>

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For More Information Contact

Toni Nix <justwrite@lowcountry.com>; Phone: 843-835-8604; Fax: 843-835-5892; USPS Address: P.O. Box 412, Cottageville, SC 29435; FedEx/UPS ship to: 398 Crab Apple Lane, Ridgeville, SC 29472.
Farewell, Old Friend

Supporting Information (SI), the crucial data behind the research, is essential to understanding and repeating cutting edge research. ACS Publications has recently digitized the SI for over 40,000 ACS original research articles, including 800,000 pages of highly valuable data and underlying research information. This means researchers will spend less time in the stacks and more time in the lab.

At no cost to the library, this adds a substantial amount of content to the ACS Legacy Archives, containing nearly 500,000 original research articles published between the years 1879 and 1995.
Trends in Health Sciences ... 
from page 1

In their article for ATG, Carla Funk, MLA’s Executive Director, J. Michael Homan, former MLA president and chair of the 2013 annual meeting’s NPC (also director of libraries at Mayo Clinic), and Lenny Rhine, trainer extraordinaire for MLA’s Librarians Without Borders E-Library Training Initiative (also university librarian emeritus, University of Florida), highlight some recent international projects, partnerships, and initiatives of MLA and its members.

Following a time honored tradition, professional health associations have had libraries at their headquarters offices and have offered library services to members. These days, health associations, often involving their members, may be active in many endeavors, as: publishers (of books and journals), developers of professional information gateways and clinical practice guidelines, providers of continuing education courses and authenticators of courses developed by others, and so much more. How central and embedded are librarians and libraries to these activities? The Health Association Libraries Section (HALS) of the Medical Library Association began in 1952 when the Medical Society Libraries Group was formed as a special interest group of MLA and has been known by its present name since 2001. In those early years, librarians sought a forum to discuss the unique issues that medical society libraries faced. How are health associations currently meeting the information needs of their headquarters’ staffs? Do they provide information services for dues-paying association members? HALS has surveyed its members since 1980 and links to survey findings can be found in the research section of its site (http://www.hals.mlanet.org/about/research/start.htm). Mary Hyde, the 2013/2014 chair of MLA’s Health Association Libraries Section (HALS), briefly reviews the landscape and highlights findings of the most recent HALS survey.1 She also illustrates some current roles of health association libraries and librarians, using the example of the American College of Obstetricians and Gynecologists, where she works.

The Association for Research Libraries (ARL) Website, (http://www.arl.org/ focus-areas/scholarly-communication), includes this definition of scholarly communication: “the system through which research and other scholarly writings are created, evaluated for quality, disseminated to the scholarly community, and preserved for future use.” The site also indicates that “researchers and scholars provide the focus and the purpose for scholarly communication. Librarians can be forceful advocates for positive change.” At the 13th annual Charleston Conference Health Sciences Lively Lunch in 2013, Robin Champieux of Oregon Health & Science University addressed three areas of her work as a health sciences scholarly communication librarian. She shared trends in 1) researcher and author profile creation; 2) studies of publications and scholarly work using traditional impact factor measures as well as newer measures such as altmetrics; and 3) views on reproducibility and re-use of scientific information in the open access (OA) world. In this issue of ATG, another health sciences scholarly communication librarian, Anneliese Taylor, focuses specifically on activities and initiatives that are in response to OA policies and mandates. The U.S. National Institutes of Health (NIH) is the largest source of funding for medical research in the world. So, there is no doubt that librarians who work at institutions receiving NIH funds should and have become involved in helping their institutions’ researchers and authors meet the requirements of the NIH mandate (NIH Public Access Policy, http://publicaccess.nih.gov/) that celebrated its 5th anniversary in 2013. This article will serve as an interesting “snapshot” since there are those who predict that many “disruptions” will continue to take place with the increasing number of open access mandates and changing nature of OA.2 Most libraries and librarians would agree that they need to be responsive and proactive in establishing their niches in the evolving “ecosystem” of research funding policies and mandates, open access, and scholarly publishing in general.

Libraries and their institutional parents try to proactively and reactively address the challenges of data management and institutional repositories (IRs). Data management plans are increasingly being mandated by funding agencies. Libraries are monitoring trends and becoming involved at various levels. Those initiatives can perhaps counteract findings such as those reported in a December 2013 Current Biology article study, that data forming the backbone of many published articles becomes less and less accessible to other researchers as years go by.3 IRs archive scholarly output and the role of libraries and librarians in IR activities has evolved over the years. In a 2010 Webinar presentation entitled, “Institutional Repositories for Medical Schools,” Tim Tannenga of hopepress alluded in the abstract to the growing trend of medical school libraries managing their own IRs.4 If a medical school does have its own IR (or plans to), what makes it unique, different, strategic? What work is involved and what elements ensure its success? In 2011 Lisa Palmer and two colleagues from Thomas Jefferson University surveyed the experiences of their respective institutions in a Webinar entitled, “Challenges and Opportunities for Medical Institutional Repositories.”5 Here in ATG, she overviews strides made in this area and shares insights from her work as an Institutional Repository Librarian in a medical school. She addresses commonalities and unique features of medical schools’ institutional repositories, compared to other types of IRs.

A September 2013 viewpoint article in JAMA was entitled “The Evolving Role and Value of Libraries and Librarians in Health Care.”6 One can observe a parallel evolving role and value of libraries and librarians in the basic sciences sector as well. Historically, many academic health sciences schools have had prominent basic scientists and educators. Basic science forms a foundation for health care education. In academic and other research
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institutes involved with translational and comparative medicine, basic science research findings can impact health care knowledge and practices. In 2010, a survey report on information seeking behaviors of basic scientists included this finding in the conclusion: “Although the basic science researchers expressed a positive attitude toward the library, they did not view its resources or services as integral to their work....” That finding was not shared by Marysue Schaeffer at the 2013 Charleston Conference Health Sciences Lively Lunch. She reported on the successful experience of Becker Medical Library at Washington University, where bioinformaticists on staff have provided specialized resources and services to the research community for the past ten years. Past ATG special issues included articles that addressed e-science (2011/2012) and VIVO (2008). In her 2014 ATG article, Susan Kendall provides an overview of the “rediscovered” basic scientist. A librarian with a basic science doctoral degree, Susan regularly works with scientists at her institution and networks with colleagues. She has developed and taught skills building CE courses in this area for colleagues in both MLA and SLA (the Special Libraries Association). She was a past convener of MLA’s Molecular Biology Special Interest Group (SIG), and is the 2013/2014 chair of the MLA’s Collection Development Section. One could conclude that, based on the efforts and successes of this author and her colleagues, suggested future roles in the conclusion of the aforementioned 2010 article are already coming to fruition at many institutions.

It is all too common to read or hear about special library closures and mergers. A small exception to that current trend has been a response to an aging population and changing demographics that have contributed to a physician shortage in the United States. As the headline of a February 15, 2010 New York Times article by Anemona Hortcotton indicated, we are now “Expecting a Surge in U.S. Medical Schools.” On November 2012, the American Medical Association (AMA) newswire featured an announcement about the opening of three new medical schools in the U.S. at UC Riverside School of Medicine (CA), Quinipiac University’s Frank H. Netter MD School of Medicine in Hamden (CT), and Western Michigan University School of Medicine in Kalamazoo (MI). At the time of the announcement, all had received preliminary accreditation status from the Liaison Committee on Medical Education (LCME). As one might imagine, hand-in-hand with hiring faculty and planning curricular matters, new medical schools also must address libraries and information services. In days gone by, this was referred to as planning for the “opening day collection.” How do present day librarians in new academic medical institutions plan for collections (or these days, online access to resources) as well as services for “opening days” — that is, the arrival of the inaugural classes of students on-site or virtually (for online courses)? What are some goals, priorities, and techniques? In her article, Elizabeth Lorbeer, library director at the third institution in the aforementioned AMA newswire announcement, shares some of her first-year plans and accomplishments. A follow-up at some future date may be interesting...

Last but not least, it is not an understatement to say that in many institutions, many things have changed. Changing budgets and priorities, external and internal, have driven libraries’ decisions on collections (information resources), staffing, and space. Views about technology and practices are changing “in the trenches.” So, in what direction should and could libraries head? Followers of hospital librarian Michelle Kraft’s lecture circuit appearances at professional meetings or readers of her blog, The Krafty Librarian: Every Librarian Needs a Bag of Tricks (http://kraftylibrarian.com/), know that they will be amused, entertained, sometimes challenged and/or invigorated by things she says and writes. Michelle has served on the MLA Social Networking Task Force, has moderated the popular “Tech Trends” session at MLA annual meetings, and, as December 2013 elections results revealed, will serve as president of MLA, beginning her duties at the conclusion of the 2014 MLA annual meeting in Chicago (May 16-21). In the 2011/2012 special issue of ATG, Patricia Hammond wrote about hospitals’ collection building and information resource work. In this issue of ATG, Michelle Kraft questions some established, perhaps entrenched, practices, routines, and thinking. It is her opinion and prognostication that much could and should (still) be changed in hospital and health sciences libraries, and perhaps other types of libraries as well.

Thanks go to all of this year’s special issue contributors for sharing their expertise and insights!

Rumors

from page 6

years of professional experience who has shown outstanding promise for continuing contribution and leadership. The recipient receives a $1,500 grant donated by YBP, Inc., and a citation in recognition of accomplishments. Congratulations, Patrick! http://www.alla.org/news/press-releases/2014/02/alcets-piercy-award-patrick-carr

Speaking of Awards! I was catching up on some professional news when I realized that the person on the cover of College and Research Libraries News was none other than Tim Bucknall!!! Tim is ACRL’s 2014 Academic/Research Librarian of the Year!! Woo hoo! Tim is assistant dean of libraries and head of electronic resources and information technologies at UNC-Greensboro. In 2004 Tim convened the Carolina Consortium, which allows libraries in both North and South Carolina to pool their monetary resources to obtain favorable pricing on electronic resources. Tim also created Journal Finder, the first open source link resolver. Journal Finder was sold to North Carolina-based WT Cox Subscriptions for $350,000 in 2008. The award is sponsored by YBP Library Services and includes a $5,000 award to be given during the ACRL President’s Program at the 2014 ALA Annual Conference in Las Vegas. http://newsandfeatures.uncg.edu/journal-finder-sold-to-wt-cox-subscriptions/583hash. BKU50dK75.dpuf

We are getting all sorts of renewals from y’all for Against the Grain. Very gratifying! We have been working on a rollout of the new

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AH, THE POIGNANCY OF MIDWEST YEARNINGS
by Bruce Strauch (The Citadel)

Here’s some good old stand-bys about the Midwest. (1) Theodore Dreiser, Sister Carrie (1900) (Carrie takes to the Chicago stage; becomes rich and famous; all her lovers end up in the gutter); (2) Sinclair Lewis, Main Street (1920) (desperate for culture in Gopher Prairie); (3) F. Scott Fitzgerald, This Side of Paradise (1920) (not sure how this one quite fits, other than Fitzgerald being Midwestern and filled with yearnings to be rich); (4) Booth Tarkington, Alice Adams (1921) (desperation to escape middle class-dom); Jetta Carleton, Moonflower Vine (1962) (a four-women-go-out-in-the-world novel; 1962 bestseller often compared to Little Women).


(M Diane is, of course, the author of the marvelous “Le Divorce,” and “The Marriage,” in which she captures all the subtleties of the French. Her new book is “Flyover Lives: A Memoir.”)

MEMORY LANE ROCK
by Bruce Strauch (The Citadel)

One of the forgotten giants of early rock was Jerome Feldman AKA Doc Pomus. Born in 1925, crippled from age 7 by polio, he spent his early years in an iron lung and casts and fell in love with music. At 17, he staggered into a Greenwich Village club on crutches and in leg braces, announced he was a blues singer. He was given a $40-a-week gig and went on from there to write and record 50 blues numbers in the 1950s for Atlantic.

“Save the Last Dance for Me,” “This Magic Moment,” “Little Sister,” “Can’t Get Used to Losing You,” and “Teenager in Love” were among his greats.

Business fell off in the ’60s when rockers started writing their own music. Then he was hit by a wrecked marriage and big back taxes owed.

In the ’70s and ’80s he staged a comeback, collaborating with B.B. King, Dr. John, and Bob Dylan.


WHITHER WARNER MUSIC?
by Bruce Strauch (The Citadel)

Leonard “Don’t call me an Oligarch” Blavatnik was born in Odessa, immigrated with his family to NY aged 21 in the ‘70s when Jews were allowed to leave the Soviet Union. He did Columbia and Harvard B-School. When Russia began selling off state industries, he bought into aluminum manufacturing, mixed it up with the crime groups, sued and was sued by partners, survived, and is now billionaire rich.

He lives in a £41 million mansion on Kensington Palace Gardens, lunches with Lord Weidenfeld, shoozmes with the Clintons. Gave £117 million for a Blavatnik School of Government at Oxford; gave $50 million to Harvard.

In 2011, he bought Warner Music for $3.3 billion. It’s said he bought it not out of a love for music but for social cachet. The execs were shocked by his tastes which run to.

Listeners don’t want to pay for streaming subscriptions.

Blavatnik seems to see Warner as a real estate buy rather than media-and-entertainment. He’ll profit from the gigantic catalogue of recordings dating to the ’60s.

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Librarians Without Borders: Building In-Country Research and Information Provision Capability

by Carla J. Funk (Executive Director, Medical Library Association; MLA International Affairs Officer) <mlaedo@mlahq.org>

and J. Michael Homan (Director, Mayo Clinic Libraries; Chair, MLA Librarians Without Borders Advisory Committee) <homan@mayo.edu>

and Lenny Rhine (E-library Training Coordinator, Medical Library Association Librarians Without Borders E-Library Training Initiative) <rhinel@ufl.edu>

Global Commitment

Global commitment for the Medical Library Association (MLA) is not a series of talking points or an informative Website, but a program that reflects a deep commitment to internationalism and outreach. One of the keys to understanding MLA’s global commitment is the association’s international strategic statement which underscores the importance of partnerships and the need to build in-country capacity through qualified librarians, technology, and information access. This includes collection development by facilitating free and/or less costly access to a variety of scientific databases through in-country training programs.

• MLA supports capacity building programs at the association, section, chapter, and individual member areas.

• MLA believes that building capacity will be most effective and long-lasting when partnerships are created with groups sharing similar goals, particularly partnerships with international agencies where shared goals intersect with available expertise and infrastructure. ¹

As part of this strategy, the MLA/Librarians Without Borders (LWB) program was formally established in 2005 as MLA’s organizational structure for its global outreach. One of the most successful programs is the grant-funded E-Library Training Initiative.

E-library Training Initiative

The MLA/Librarians Without Borders (LWB) e-library training initiative was established in 2002 and is funded in part by the generous support of the Elsevier Foundation. It provides access to quality health information training through distance education programs and the mobilization of volunteers for in-country training and workshops. Besides the Elsevier Foundation, MLA also partners with the Health Interactive Network Access to Research Initiative (HINARI) Access to Research in Health Programme, the Information Training and Outreach Centre for Africa (ITOCA), and the World Health Organization (WHO) among others. HINARI is included in the Research4Life program that is a public-private partnership between WHO, the Food and Agricultural Organization (FAO), the United Nations Environment Programme (UNEP), the World Intellectual Property Organization (WIPO), and others with 190 science publishers facilitated by the International Association of STM Publishers. MLA has also worked with other partners to support this program including the World Health Organization’s European, Western Pacific, and Southeast Asia and Eastern Mediterranean Regional Offices, the Pan American Health Organization, and the Ministries of Health, universities, medical schools, libraries, and hospitals in the countries and cities where the workshops were held. The partnership’s goal is to reduce the gap in scientific knowledge between industrialized countries and the developing world by providing long-term training on the use of online resources through a variety of training modules. ³

HINARI was established in 2002 with six publishers including Blackwell, Elsevier Science, the Harcourt World STM Group, Wolters Kluwer International Health & Science, Springer Verlag, and John Wiley that provided free or low cost online access to about 1,500 journals in biomedical and related social sciences to local, not-for-profit institutions in developing countries. HINARI has grown to more than 150 publishers offering more than 37,000 information resources. ⁴

E-Library Training Coordinator, Lenny Rhine, has coordinated the e-library training initiative since its inception. He has taught almost 1,000 people in twenty-nine countries around the world including library staff members, researchers, university faculty, physicians and nurses, medical students, Ministries of Health, public health staff, pharmacists, med...
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Beginning in 2012, the file downloads of HINARI training materials have been tracked. During 2012 and the first eight months of 2013, these downloads averaged 200,000 per year. The most downloaded files include several unanticipat ed titles. For example, the Arabic version of a MeSH training module, BabElMeSHmodule, was downloaded over 8,000 times in the first eight months of this year.

**Overall Results**

The e-library training initiative focuses on training workshops, the development and updating of training materials for use of HINARI materials, and creation of distance learning courses for HINARI, AGORA, and OARE. It gives participants sufficient knowledge of resources that are freely available via the Internet. Areas include consumer health/patient education materials (MedlinePlus), sources of e-Books, and evidence-based medicine resources. There has also been discussion of the possible development of a national digital archive for some areas.

The e-library training initiative also provides an overview of open access journals including Internet links to these resources, plus “full text” search options in PubMed and MYNCBI. It highlights keys to searching in HINARI/PubMed and also health information on the Internet. The trainers also sometimes focus on underutilized evidence-based medicine and e-book resources and PubMed features. The courses include Health Information on the Internet, Evidence-Based Practice Resources for HINARI Users, and eBook resources for HINARI users.6

**People Profile**

**J. Michael Homan**

Director of Libraries, Mayo Clinic Libraries
Mayo Clinic, 200 First Street SW, Rochester, MN 55905
Phone: (507) 284-9595 • Fax: (507) 284-1038
<homan@mayo.edu> • http://www.mayo.edu/library

**BORN AND LIVED:** Born in Portland, Oregon but raised in Enterprise located in Wallowa County in far northeastern Oregon near the Idaho border. I have lived in Portland, Chicago, Los Angeles, Santa Monica, Kalamazoo, Irvine, and Rochester.

**PROFESSIONAL CAREER AND ACTIVITIES:** Began as a UCLA Biomedical Library intern and later as an employee of the Pacific Southwest Regional Medical Library at UCLA. Following the UCLA post I managed specialized library services at The Upjohn Company, a large multinational pharmaceutical company now part of Pfizer in Kalamazoo. I returned to the Irvine campus of the University of California as the AUL for the Sciences and to participate in the planning, design, and construction of a large consolidated science library. Since 1994 I have been enterprise director of libraries at Mayo Clinic in Rochester.

**IN MY SPARE TIME:** Gardening, reading, travel, and music — particularly opera.

**FAVORITE BOOKS:** I like novels and short stories and just finished *Dear Life* by Alice Munro and *Zoll* by Colum McCann. Also like current events/politics and I’m currently reading *Charles Krauthammer’s Things That Matter* and have a digital subscription to the *New York Times*.

**PET PEEVES:** Those without passion and opinions.

**PHILOSOPHY:** You can achieve a great deal if you don’t mind who gets the credit.

**GOAL I HOPE TO ACHIEVE FIVE YEARS FROM NOW:** Continuing to contribute to the profession but happily retired and enjoying many opera and symphony performances, travel, and quality time with my Oregon family, and my friends in many places.

**HOW/WHERE DO I SEE THE INDUSTRY IN FIVE YEARS:** There is intense competition among the multinational publishers of point-of-care clinical information systems. All want to be included in some indispensable way within the clinical and research workflows. Librarians will continue to jockey for key positions from which to assure ongoing licenses for their products as well as device independent access to their content. There will be further refinement of Web-scale discovery tools and development of specialized software for clinical environments to rapidly adjudicate the best internal and external information at the point of care from within EMR systems. Librarians have key roles to play in these developments including resource evaluation and the increasing need for mediated services and specialists (embedded librarians; informationists) to navigate and curate the increasingly complex and growing digital ecology of e-resources and data.

**Biographical Information**

**Education:** Bachelor of Science degree from Oregon State University in Animal Science.

**Professional career and activities:**

- **Biomedical Library intern**
- **Began as a Biomedical Library intern at the University of California, Los Angeles in 1979.**
- **Later moved to the Mayo Clinic in Rochester, Minnesota in 1988.**
- **Currently serves as the Director of Libraries at Mayo Clinic Libraries.**

**Current position:** Director of Libraries, Mayo Clinic Libraries

**Obituaries:**

- **HINARI Users, and eBook resources for HINARI Users.**

**Continued on page 18**
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For the past two years, all workshops have included a cross-program training module titled “Research4Life Programmes — Similarities and Differences.” The HINARI, AGORA, and OARE Web interfaces are reviewed, as are the different databases and search tools. This is most useful for participants from universities where there is access to multiple Research4Life programs. By the end of 2014, all the programs will have the same search tool (SUMMON) and this will increase the similarities among the programs. Also, during the past year, the HINARI training staff has developed better tools to evaluate the impact of training besides the post-workshop surveys that are now used. This includes evaluating pre- and post-workshop usage of the HINARI resources and sending an “outputs” survey six months after a workshop is concluded.

Challenges

Some challenges for the e-library training program have been Internet and Wi-Fi access and the availability of laptops. The speed of Internet access has slowly but surely increased in many countries although bandwidth and minutes still can be expensive. For example, in Sub-Saharan Africa, the increase often is the result of access via cables strung to East and West Africa with less reliance on satellite links. Also, the eligible institutions have increased bandwidth as there is a better understanding of the potential of the Internet as a source of academic and research information.

Approximately three years ago, participants began bringing laptops to workshops. In most cases, the host institutions have also added Wi-Fi access. Consequently, participants can bookmark Internet links and save files directly to their laptops. Also, bibliographic management software such as Zotero or Mendeley can be downloaded directly onto these laptops.

Finally, a continuing challenge is to maintain funding for the program. We hope to continue to work with the Elsevier Foundation and several other partners to continue this very valuable program.

Conclusion

The MLA/Librarians Without Borders e-library training initiative has successfully worked for the past six years in partnership with a variety of other organizations to train health and health-related professionals, including librarians, to effectively access and use health-related databases. The program has also trained U.S. health sciences librarians to be trainers of their international colleagues. This global outreach project has not only renewed MLA’s historic international commitment to assist people anywhere in the world, but in a practical sense has demonstrated a consistent ability to work with a diverse group of individuals and funding organizations to build in-country capacity for improved health of all participants.

Endnotes

Rumors
from page 12

Speaking of which, one of the books reviewed in this issue is Reinventing the Library for Online Education by Frederick Stielow. See this issue, p.44.

Reinventing the library operation(s) is being explored everywhere we turn. The work that Outsell is doing to survey the information industry gives us a longitudinal snapshot of our end users. In this issue, we have a look at Outsell’s End-User Study of Faculty and Students. Interestingly that faculty are more loyal to print than expected and both faculty and students find digital textbooks more difficult to work with than with their print counterparts. See this fascinating summary, this issue, p.90.

continued on page 22
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Health Association Libraries: The Spackle Needed for Member Societies

by Mary A. Hyde  (Senior Director, Resource Center, American College of Obstetricians and Gynecologists) <mhyde@acog.org>

Introduction

Since 1952 there has been a special interest group or section within the Medical Library Association (MLA) that represents medical society libraries and librarians. The section is now known as the Health Association Libraries Section (HALS). Health association libraries provide library services to staff and many provide services to their members as well. We often fill in for those who don’t have access to the library services that they may need. Over time we have learned that to continue to exist we need to adapt our services to fit the shifting priorities and needs of our parent organizations.

The Health Association Libraries Section and its predecessors have conducted periodic surveys since 1980. The surveys have focused on basic data about clientele, collections, staff, services, funding, and stability. The surveys have captured why many of these special libraries have succeeded in tough financial times.

Library Environment and Services

As in the past, HALS recently conducted a survey of its members and other medical societies for information on status, services, staffing, and technology. This survey showed that many of our members still provide traditional library services such as reference, searches, document delivery, current awareness, user instruction, research, and fact-checking.

HALS members offer services to organization staff, but less frequently provide services to members, nonmember health professionals, and the public. Many libraries have also supported their organizations in non-traditional ways. Some of these non-traditional services are providing or organizing archives, publications support, advocacy, records management, Website development, and consumer health.

One Health Association Library’s Environment and Services

The consolidated results from the 2011 HALS survey were published in the October 2013 Journal of the Medical Library Association. The following is one illustration of what a typical (or not) association library does for its staff and members.

The American College of Obstetricians and Gynecologists was founded in 1951 and now has more than 57,000 members. The Resource Center, the College’s library was established in 1969. The Resource Center at the American College of Obstetricians and Gynecologists has become an integral part of the College. The Resource Center is located in the lower level of The College’s headquarters. The Resource Center includes several collections. The Resource Center has over 12,000 books, 450 serial titles, and 400 reference files in all areas of women’s health. We have 8 staff, 5 professional librarians and 3 library technicians. The Resource Center has the largest number of staff of the association libraries and may be on par with the American Academy of Pediatrics as far as collection size.

The Reading Room of the Resource Center contains current editions of publications including journals and other serials. The Resource Center stacks contain journals that go back to 1869, books that go back to 1951 with the founding of the College, and publications archives. The History Reading Room contains books that are about the history of medicine, women’s health, obstetrics and gynecology, and medical schools, as well as biographical information of those who have been instrumental in women’s health. The history stacks contain publications that physicians used at the time they were practicing. Our oldest document is from 1552. Also in the history stacks are the College’s organizational archives and audiovisual collection. The Burnhill Collection of birth control publications is also housed in the history stacks. The History Museum is the visual history of the specialty and includes a collection of forceps and a collection of vibrators.

Traditional Library Services

Current Awareness — The Resource Center provides a current awareness service to staff and members of articles that may be of interest to them in the development of College publications or in their practice. At this time we are utilizing The Old Reader to manage our journal and news feeds. The Old Reader is similar to the old Google Reader.

Document Delivery — The Resource Center has an Interlibrary Loan Department that provides articles, books, and other documents to staff of the College. We have had to expand this service to include many of our members who have been left without access to library services in the healthcare institutions where they work. Although this member benefit is not known by most members, it is something we provide when asked.

Fact Checking — The Resource Center provides fact-checking for our Communications department to respond to reporter questions.

Online Searches — The Resource Center provides online searches for staff. We have provided evidence based medicine searches to staff that develop the Practice Bulletins for the College for many years. We also provide searches to Committees for other College publications. The Resource Center provides members with searches upon request.

Reference Service — The Resource Center provides reference services to staff, members, consumers, and other non-members of the College. Our main function is to provide assistance to staff in their development of College practice guidelines (i.e., Practice Bulletins, Committee Opinions, Guideline Books) and other publications (i.e., Patient Education Pamphlets, Your Pregnancy and Birth, Professional Liability and Risk Management). We provide reference service to members who have questions about College guidelines that they need for their practices. We provide guidelines to consumers and other non-members to help answer their questions when it pertains to an obstetric or gynecologic issue.

Research — The Resource Center also researches information for staff, whether it is for a forthcoming publication or if they have received a request from a member. The Resource Center attends committee meetings on the development of guidelines so that when a search is necessary the Resource Center can perform one then or when it is requested after the meeting.

User Instruction — The Resource Center trains staff on using the library and provides a tour of our collections. We don’t use a traditional classification system, because our collections are very subject specific. Having user instruction is essential for staff to use the Resource Center effectively.

Non-Traditional Library Services

Advocacy — The Resource Center advocates for the College by exhibiting at meetings. We are the lead exhibitor at our Annual Clinical Meeting. We organize and display the materials that the College produces and we answer many of the questions that members and other participants may have about the College and its activities. We have often exhibited at the annual MLA meetings as well.

Archives — The College has maintained an organizational and publications archives for many years. We hope that our publications archive includes at least one copy of every document we have ever published. Many patrons who request information from the organizational archives seem to confuse us with the archives that can be found at many universities, which contain the papers of their faculty and staff. Ours however, is organizational by nature and contains minutes, programs, directories, and audiovisual materials.

Consumer Health — The Resource Center provides information to consumers on women’s health issues. Staff will also send lists of physicians if a consumer needs a physician referral.

Historical Collection — The Resource Center’s historical collection is a very important...
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ant part of the collection. Our history information is not only about the books physicians used at the time they were practicing, but it also contains information about the history of medicine, history of obstetrics and gynecology, biographical or historical information on famous obstetricians, gynecologists, and other famous figures, as well as the histories of some medical schools.

Museum — The History Museum is the visual history of obstetrics and gynecology. You can find a display on forceps, destructive instruments, pelvimeters, sounds, pessaries, kegel meters, vibrators, models, IUDs (including the Dalkon shield), birth control pills (from the very complex to the very simple), condoms, and medicines of many types.

Publications Support — Resource Center staff provide publication assistance to College staff by verifying the references that are used in our publications. Often we find that a reference has been replaced by something newer or is rather questionable and should not be used. We provide alternatives if necessary. Staff attend committee meetings and often are asked for input as to what kind of questions we get from members and consumers that would be relevant for guideline development.

Website — The Resource Center maintains its section of the College Website and often provides information to other staff about a broken link or the need to update a page. We provide the “coding” for the documents to Web services staff to use to provide access to the documents on the Web page.

Conclusion

Many health association libraries are an integral part of their organizations. They provide traditional and non-traditional services not only to the organizational staff, but to members and non-members as well. The Medical Library Association’s Health Association Libraries Section provides members with feedback on how other societies may be handling a specific need within their organization. We like to help each other evolve and grow as librarians and libraries. Without each other we would not be able to learn adaptive techniques, fulfill the needs of our organization, and thrive.

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Cultivating Scholarship: The Role of Institutional Repositories in Health Sciences Libraries

by Lisa A. Palmer (Institutional Repository Librarian, Lamar Soutter Library, University of Massachusetts Medical School, Worcester, MA) <lisa.palmer@umassmed.edu>

The daily activities of institutional repository administrators are varied and challenging. We help our students, faculty, and researchers submit their scholarly publications into the repository. We track our researchers’ new publications. We explain what “open access” means. We consult on copyright issues to determine if a paper, or given version of a paper, can be deposited. We respond to requests from academic departments to create new collections and reconfigure existing collections. We consult our platform vendor or programmers about system problems and functionality questions. We do promotion, outreach, workflow analysis, project management, training, supervision, quality control, metadata management, and customer service. We perfect our “elevator speech” so that we can concisely explain the value of this work when opportunities arise.

Institutional repository administrators do all this to cultivate and disseminate the scholarship at their institutions. Cultivation, or gardening, is an apt metaphor for the management of an institutional repository. Gardening requires land or a box for planting, just as a repository requires a software platform. A garden benefits from planning and structure, as does an institutional repository. Both gardens and repositories need care and encouragement to grow, and those who work with them must be patient and be prepared to work for a long time without seeing much progress.

The early promise of institutional repositories is beginning to bear fruit. Medical libraries with institutional repositories, like other academic libraries, have found that their repositories support new ways of engaging with researchers and meeting the challenges posed by the transformation in scholarly communication over the past decade exemplified by open access, the National Institutes of Health Public Access Policy, campus-based publishing, and the sharing of research data. Institutional repositories can grow and thrive in academic health sciences libraries and be a vital component in the provision of library services to faculty, researchers, staff, and students.

Repository Services in Academic Health Sciences Libraries

The concept of an institutional repository — “a set of services that a university offers to the members of its community for the management and dissemination of digital materials created by the institution and its community members”¹ — emerged over a decade ago with the development of the DSpace and EPrints open source repositories. According to OpenDOAR, the Directory of Open Access Repositories, there are now more than 2,100 institutional repositories worldwide.²

In 2010, the Association of Academic Health Sciences Libraries (AAHSL) compiled statistics on services provided by their 117 members in the U.S. and Canada. Of these 117 libraries, 35.9% (42) reported offering institutional repository services, with 34.2% (40) planning or considering institutional repositories.³ Some of these institutional repositories are “standalone” repositories managed by the medical library; in other cases, medical libraries are utilizing the repository managed through the main campus library. Examples of medical institutional repositories can be located through a search of OpenDOAR (Repository type: Institutional, Subject area: Health & Medicine); additional medical repositories are accessible via the Website of the bepress Digital Commons hosted repository system.⁴

In order to be successful, the institutional repository services put into practice by health sciences libraries should be appropriate to and valued by the institution at large. A significant role for a repository manager is to determine, provide, and promote customized repository services that will engage researchers and departments. The services described below are not unique to health sciences libraries but have been successful in the medical environment.

Research Product Dissemination — The primary benefit of institutional repositories is that they raise the visibility and enhance the accessibility of publications by providing free, unrestricted online access to these publications. Content is discoverable in Google, Google Scholar, and other search engines, ensuring breadth of dissemination. Like other institutional repositories, medical repository collections contain a range of products: theses and dissertations, journal articles, book chapters, posters, presentations, student projects, datasets, and archival and historical materials. Content unique to the health sciences includes patient education materials, anatomy videos, and Grand Rounds lectures.

Open Access Advocacy — The introduction of the National Institutes of Health (NIH) Public Access Policy in 2008 provided medical librarians with a new avenue of outreach to researchers, as well as a conversation-starter about the open access movement. This policy requires scientists to submit final peer-reviewed journal manuscripts that arise from NIH funds — the leading source of research funding at many academic health centers — to the digital archive PubMed Central (PMC) immediately upon acceptance for publication. The NIH policy has proven to be an important driver for researchers to engage with librarians about open access, author rights, and the benefits of allowing their research results to be more easily accessed and used. Having an established repository in place to accept open access material and for self-archiving of journal articles is a significant and useful approach for promoting open access on campus. Authors who have made their publications openly accessible in the institutional repository and departments that are utilizing the repository for open access journal hosting may be willing to open campus open access efforts with other researchers and groups.

Measurement of Research Impact — Institutional repositories generate impressive usage metrics that can be a strong incentive for individual researchers and departmental leaders to partner with libraries to deposit publications and remain engaged. Repository downloads are a component of newly emerging “altmetrics” tools that track and measure the scholarly influence and research impact of online publications in real time. Many academic libraries, including those in the health sciences, are beginning to raise awareness and develop outreach services for their researchers about altmetrics. These tools may prove to be particularly useful in the medical environment if they can provide evidence of success or impact in terms of community engagement with clinical research.

Showcase for Individual Researchers, Departments, and the Institution — A major motivation for researchers to participate in an institutional repository is to increase the visibility of their publications, and thus their own prestige. Some institutional repositories are integrated with faculty profile tools that showcase individual researchers, their research interests, and their publications. Academic departments, schools, research centers, and the institution as a whole can benefit from these activities as well. Publication collections serve as showcases to attract prospective graduate students, researchers, and faculty, and can help departments manage and track their publishing output. At the University of Massachusetts Medical School, RSS (Really Simple Syndication) feeds from some collections in the institutional repository, eScholarship@UMMS, have been embedded into department home pages on the university Website to create fresh, dynamic listings that automatically display the latest publications authored by their faculty and students. This creative application effectively leverages the institutional repository, eliminates redundant

continued on page 26

² http://www.against-the-grain.com>

¹ "Against the Grain / April 2014"
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work, and integrates the repository with existing services—a win-win for the department, the library, and the institution.

Campus-based Publishing Support — Medical libraries have joined other academic libraries in exploring campus-based publishing, with institutional repositories being utilized for the hosting and publication of electronic journals. Repository administrators are gaining experience with all aspects of the publishing process, including obtaining ISSNs, assigning digital object identifiers (DOIs), applying for MEDLINE indexing in PubMed, and incorporating altmetrics into journal displays. Content unique to the health sciences includes open access journals that promote “trainee” scholarship and research by medical students, residents, and fellows, and research briefs describing mental health research in a user-friendly way for all readers.

Grant Support — Institutional repositories can be an important tool for securing grants and demonstrating impact for publicly funded projects. Through the dissemination of scientific meeting abstracts and posters, repositories provide exposure to pilot studies and groundbreaking research and supply authors and their institutions with data on the public engagement and impact of research for funding organizations and other stakeholders.

About 60 academic health sciences libraries support institutions that are part of the NIH-sponsored Clinical and Translational Science Awards (CTSA) program. The goals of this program are to accelerate the translation of laboratory discoveries into treatments for patients, to engage communities in clinical research efforts, and to train a new generation of clinical and translational researchers. Institutional repositories are being used by some program members to capture community scholarship, disseminate research results, and set up collections of papers resulting from research funded by the grant. The institutional repository helps to increase the visibility of the CTSA work and provides administrators with usage statistics for grant progress and assessment reports.

Data Sharing — Institutional repositories are a strong infrastructure component of a research data management and data sharing strategy, as they are designed to easily store data that libraries support scholarly publications. Student theses and dissertations present an excellent opportunity for libraries with existing repositories to pilot or introduce services around research data. Theses and dissertations are rich in content that is already flowing into the repository, and students may be receptive to sharing supplemental data files that otherwise might not be accessible to readers of the dissertation.

In February 2013 the President’s Office of Science and Technology Policy (OSTP) announced that all federal agencies with research budgets larger than $100 million would be expected to follow the NIH’s lead by providing public access to publicly-funded research—both publications and research data—within one year. This development represented years of work by librarians and other advocates, and was overwhelmingly supported by the medical library community. In response to the OSTP directive, the Association of American Universities, the Association of Research Libraries, and the Association of Public and Land-Grant Universities collaborated to propose a system of cross-institutional digital repositories called the Shared Access Research Ecosystem (SHARE). SHARE’s working groups are now in place. SHARE is clearly a major opportunity for all institutional repositories.

Partnerships and Collaboration — These examples of repository services demonstrate how an institutional repository serves as a critical tool to help health sciences libraries cultivate new partnerships and roles, enhance existing relationships, and collaborate with departments at their institutions. Traditional library liaison connections can be leveraged to advocate for using the institutional repository for archiving and disseminating faculty research output. In many cases departments are enthusiastic and pleased to be able to piggyback on an existing platform in use at the medical school to save time and money.

A top trend in academic librarianship is the concept of the “embedded librarian” or “informationist,” which is a librarian being physically available or embedded within academic departments or on research teams. Repository administrators, in view of the widespread services they provide on campus, might consider themselves “virtually embedded” across the entire institution.

Barriers and Challenges

There is no shortage of articles in the library literature detailing the many barriers and challenges for populating and growing institutional repositories. Some of these barriers are more critical for medical libraries: content recruitment; redundancy; and staffing, sustainability, and scalability.

Content Recruitment — It is difficult to grow a repository when researchers lack the motivation to deposit, overestimate the time and effort required, are overwhelmed by the complexity of copyright issues, or are not aware of the services available. These obstacles are heightened in the academic health sciences environment where many researchers are also teaching faculty, administrators, and practicing clinicians. A recent report from the Confederation of Open Access Repositories (COAR) outlines a variety of successful and sustainable practices for populating repositories. Medical institutional repositories, like those in academic libraries, have reduced barriers by providing services such as mediated deposit, copyright consultation, embargo periods, and systematic harvesting from databases. Other strategies to increase participation include adding value with customized repository services responsive to researcher needs, leveraging existing relationships that the library director and other librarians have with campus departments, offering to do pilot projects that build trust, and focusing on those individuals and groups that are receptive to these services.

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from page 26

Redundancy — Busy researchers in academic health centers — many of whom are required to submit manuscripts to PubMed Central — often perceive self-archiving in institutional repositories to be a redundant activity. Some can be convinced by arguments that the library is building a comprehensive collection of university scholarship, including faculty papers that cannot be made available through PubMed Central, and that it is important not to rely on external sources to make these publications accessible. This is an ongoing issue for the administrators of medical institutional repositories to address, and in fact, some have decided not to routinely collect papers from PubMed Central. Implementing automated harvesting and direct deposit solutions that reduce researcher effort are critical. A federated network of repositories as envisioned by SHARE may lessen or even eliminate redundancy in the future.

Staffing, Sustainability, and Scalability — Like other academic libraries, health sciences libraries have employed various approaches for staffing and allocating resources for their institutional repositories. Opportunities for medical libraries tend to be more limited, since in general they have smaller staffs and may not have access to undergraduate student labor to perform repository tasks. The staffing dilemma may lead medical libraries to rely on the institutional repositories managed by the main campus library, or make them hesitant to become actively involved.

Some medical libraries have moved forward by repurposing or reprioritizing existing librarians and paraprofessionals from areas where services have declined, such as cataloging or circulation. Cross-departmental teams are also an option. Permanent staffing and strong leadership clearly help with repository promotion, content recruitment, and building trust and credibility. Departmental administrative staff can be enlisted for assisting with deposits for their departments. Technology and automated solutions should be explored.

Staffing for repository work is certainly a challenge, but investing in this work allows the library to provide a valuable service to the community and builds relationships among library staff and researchers. Support of library administration for institutional repositories is a key factor for successful and creative staffing solutions.

Looking Ahead

Academic libraries are confronting rapid changes in higher education and scholarly communication. As open access and research data sharing gain momentum, institutional repositories have taken root at many academic libraries, including health sciences libraries, and are becoming a critical component of the services that libraries provide to their researchers, faculty, staff, and students. The care, encouragement, and patience of repository administrators are paying off, and the utilization of institutional repositories is growing to include publishing, grant support, and the measurement of research impact. The promise and potential of a federated network of repositories are compelling. Medical libraries should continue to cultivate their institutional repositories, which in turn allow them to cultivate and disseminate scholarship produced at their institutions. By playing a critical leadership role in this area, medical libraries can gain visibility and credibility across the institution, expand the skills and expertise of library staff, and build new partnerships and collaborations.

Acknowledgment

This paper is based in part on ideas presented in a 2011 Webinar, “Challenges and Opportunities for Medical Institutional Repositories” with Dan Kipnis and Ann Koopman, and a presentation at the Special Libraries Association Annual Conference, Chicago, Illinois, July 2012. 

Endnotes


Libraries Take on Policy: Support for Open Access and Open Data

by Anneliese Taylor (Assistant Director for Scholarly Communications & Collections) <anneliese.taylor@ucsf.edu>

The growth of open access (OA) journal publishing has exploded in the last decade. The number of full, immediate OA articles went from 2% to 11% of all articles published between 2000 and 2011. When hybrid and embargoed open access articles are included in the count, the 2011 total jumps to 17% across all disciplines. And looking at biomedical journals specifically, 36% of articles published were OA.1

Alongside this impressive growth in what’s commonly referred to as gold open access publishing has been a multi-pronged effort to expand access to published articles through “green” open access. Green OA is the process of depositing a version of a published article in an open access repository, whether that be an institutional repository (IR) or a disciplinary repository, or even placing articles on an openly accessible Website. “Self-archiving” is frequently used interchangeably with green OA. It does not require authors to pay an article processing charge as many gold OA models do.

Many publishers have a history of allowing authors to self-archive a version of their article. The version is typically the accepted author’s manuscript, incorporating changes from the peer-review process, but before the publisher has co-edited, formatted, and branded the manuscript for final publication. A very few publishers allow the final, published version to be uploaded via self-archiving. There may or may not be a delay period after publication before the manuscript can be made accessible.

Open access policies passed at the institutional level or by research funders are an attempt to broaden public access on a larger scale. The potential to open up access via a formalized policy is significant, but not without some effort. The next sections will highlight health sciences libraries and their roles with green OA policies in the United States.

NIH Public Access Policy

The single largest influencer on the growth of green OA articles in the health sciences to date is the National Institutes of Health (NIH) Public Access Policy, passed in 2008. This policy requires peer-reviewed scholarly...
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articles published by NIH-funded researchers to be submitted to PubMed Central (PMC). The articles are made publicly available no later than twelve months after the official publication date. PMC is NIH’s freely accessible, full text article repository, with close to three million articles currently deposited. NIH Policy manuscripts are about 10% of this amount. The rest of the content comes from publishers that voluntarily deposit their articles, usually after a publication delay.

Many health sciences (HS) libraries got involved in 2008 or earlier with support for researchers at their academy needing to comply with the policy. Efforts range from offering workshops and individual consultations to notifying authors which of their articles are non-compliant and what steps to take to make them compliant. There are a number of excellent NIH Policy LibGuides (e.g., Duke University and University of Washington) and video tutorials (e.g., New York University and Harvard University) created by librarians to assist researchers.

An informal survey in 2013 of Association of Academic Health Sciences Libraries (AAHSL) member involvement in supporting the Policy indicated a high level of activity amongst health sciences libraries. Of the 25 responses, all but four were actively involved with a support role. It’s remarkable that HS libraries are taking on this new responsibility at a time with shrinking staff and budgets. The work can be very involved and time-consuming, so it is no small decision to take it on.

Here are a few notable initiatives:

- University of Arkansas for Medical Sciences Library runs reports on the NIH Public Access Compliance Monitor (PACM) of UAMS authors’ adherence to the Policy on a departmental, institutional, and individual PI level. The library shares the documents it uses to notify authors or other institutions’ benefit.

- The Countway Medical Library at Harvard University built an online submission system where authors can deposit their manuscripts. A librarian logs in to the NIH Manuscript Submission System (NIHMS) as a publisher, enabling deposit of multiple papers on behalf of authors. After a coordinated outreach effort, Harvard’s compliance rate jumped to the 90% range.

- With help from a grant, Health Sciences Libraries staff at New York University programmed an automated system to notify School of Medicine authors who have published articles that are not compliant with the policy. The program matches PACM data with an internal Sponsored Programs Administration database to identify active grants and contact emails. Seven months after the library started sending monthly email notices in June 2013, the SOM’s compliance rate rose from 79% to 87%.

- On behalf of authors with non-compliant articles published in “Method D” journals (where publisher makes initial deposit), the University of California, San Francisco Library sent lists to several publishers with a request to deposit the manuscripts into NIHMS. Results were mixed but fortunately the publisher with the most non-deposited articles agreed to deposit all manuscripts.

The advantages to the library are the opportunity to collaborate with different groups on campus, and filling a needed role. Offices of sponsored research have welcomed librarians’ help in supporting researchers trying to work through the complications of getting the PMCID, which indicates an article is compliant. Efforts where research offices and the library work as a team are particularly effective, as each group has its own strength. Librarians have established relationships with publishers and are accustomed to reading contract agreements and to finding the needle in the haystack. There are several steps to compliance with the NIH Policy, leaving plenty of room for error, so librarians’ perseverance with detail comes in handy.

Librarians who have discussed this topic informally among themselves often indicate that benefits include the opportunity to do outreach in new ways and with new constituents at their organization as benefits. Putting librarians in a public service role related to the policy is good exposure for the library, so long as the library comes off as a helpful resource and not simply as enforcement. The level of support is determined by the library’s priorities and available resources, by institutional culture, and by acceptance from campus groups of the library taking the lead in research policy compliance support.

You might be wondering, is it worth it for the library (or anyone else for that matter) to go to all of this effort? Consider the fact that PMC gets over 700,000 unique visitors daily, from around the world (a fact that doesn’t exist continued on page 32
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to Federally-Funded Research
The need for library support for the NIH Public Access Policy is likely to lessen over the next few years as authors get continually comfortable with the routine. Meanwhile, a similar policy will be expanding to other U.S. federal agencies. Under President Obama, the White House Office of Science & Technology Policy (OSTP) issued a directive in February 2013 to all federal agencies with more than $100M in research & development expenditures to develop a public access policy. It calls for making the direct results of federally funded research, both peer-reviewed articles and digital data, publicly available and useful.

On January 17, President Obama signed the 2014 omnibus appropriations legislation, thereby codifying a portion of the OSTP directive. The new law calls for the manuscripts of articles funded through awards from the Departments of Education, Health & Human Services, and Labor to be made publicly accessible no later than 12 months after publication. Other parts of the directive are not addressed in the legislation and information has yet to come on how these aspects will be addressed.

The directive extends a public access policy to around 20 agencies, including the National Science Foundation and the Department of Energy. Another interesting part of this order is the inclusion of data and metadata and the focus on the usability and preservation of research outputs. Under the NIH Public Access Policy, data are not included, and access is the only thing specified. The OSTP highlights the importance of being able to search, retrieve, and analyze data in digital formats to enable scientific breakthroughs and stimulate innovations.

On the data front, researchers will be required to develop data management plans and will be expected to deposit data in publicly accessible databases “where appropriate and available.” Since some publishers (PLOS, Nature) and some funders such as the National Science Foundation and the NIH already require data management plans, several academic libraries have already established programs around data management and data curation. These programs are multi-disciplinary and therefore not necessarily based in the health sciences library, however HS subject liaisons are increasingly involved in helping researchers make plans to properly store, preserve, and share their data.

Data is the new currency for research, and libraries and their institutions are increasingly partnering to develop data curation infrastructure and services. The DataConservancy project is the outcome of a $20M NSF grant awarded to the Johns Hopkins University Sheridan Libraries. The project provides tools to preserve, share, and discover data. A popular, free tool for generating data management plans is the DMPTool, run by the California Digital Library (CDL).

The datasets themselves may be deposited in a growing selection of open data repositories, which are managed by government agencies, non-profit and commercial organizations, and academic institutions. The UCSF Library partnered with the UCSF Clinical & Translational Science Institute and the CDL to develop an open data repository for UCSF scientists called DataShare, released in 2013. Data is preserved in CDL’s Merritt repository and each dataset is assigned a unique EZID identifier for tracking and citation. Content is gradually being added, as researchers overcome the hurdle of discomfort with releasing datasets too soon.

It remains to be seen what kind of impact the OSTP directive will have on libraries, as the office has yet to release plans for carrying out the policy. Specifically stated, it’s preference for agencies to work together in developing plans, and to leverage existing archives. It also encourages public-private partnerships where appropriate.

If the chosen model is along the lines of what the publisher-backed CHORUS has proposed, the content would reside on publishers’ servers and would require less involvement by authors and librarians who support them (though it’s hard to imagine any system not requiring some level of intervention and compliance verification). If the SHARE model is adopted, which relies on university-based digital repositories, then library involvement will be significant, as the stewards for institutional repositories. Of course, the government might opt for more than one method, depending on the agency. Then we’ll certainly have our hands full!

Organizational Open Access Policies
Yet another approach to broadening access to scholarly research is the institutional open access policy. There are currently 250 institutional or sub-institutional OA mandates in place around the world, and the list grows monthly. The policies are passed by academic faculty or researchers, and libraries take on the implementation. Librarians in all disciplines have become deeply engaged in the intricacies of these policies and in supporting authors depositing their final manuscripts in the institutional repository.

Institutional OA policies have a great potential to expand (true) open access (not just public access) to a vast quantity of peer-reviewed scholarly articles. In practice, however, the compliance rate is very low as it relies on authors voluntarily depositing their articles in an open repository — without the threat of losing funding if they don’t take the steps. Always the information organizers, several libraries have invested in database solutions to manage author publication tracking and deposit workflows. The libraries at Duke University, MIT, and the University of California have all initiated implementation of such a tool (managed by but not necessarily funded by the library). The effectiveness of these projects will be evaluated after a period of implementation and will inform the library community at large about what kind of results can be expected as a return on the library’s commitment to supporting OA policies.

Looking Ahead
There is no doubt that the library’s role within the academy is going through significant transition, especially when it comes to health sciences fields. As the nature of clinical practice, research, and scholarly communication changes with technological advances, libraries are finding their niche and trying on new roles that build on librarian strengths.

Endnotes
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Not that long ago, maybe 10-15 years, most academic health sciences librarians seemed focused almost exclusively on the professional colleges that they served: medical and nursing, perhaps pharmacy, dentistry, or veterinary. In 2002, a *Journal of the Medical Library Association* paper on new roles for health sciences librarians mentioned several new opportunities for working with clinical patrons: participating in grand rounds and continuing medical education, working with community health professionals, filtering quality sources in the clinical environment, and incorporating more library instruction into the medical curriculum.¹ ¹ New was a health sciences librarian in 2002, and it certainly seemed to me, when looking at programs, papers, and posters at the *Medical Library Association* conference, that the clinical areas were where librarians were having an impact. Very little mention was made of that whole other set of library users making up a large percentage of the people working in academic medical centers: the basic biomedical scientists, the PhD researchers, faculty, postdoctoral fellows, graduate students, and research assistants working in laboratories. It wasn’t hard to guess why. In large part, these researchers were self-sufficient. Their happiness with the library seemed entirely dependent on an extensive journal collection. Other than that, they did not feel they needed the library. They did their own Medline searches, rarely consulted any reference books that they did not own, and passed down information seeking and management behavior along with scientific knowledge and laboratory skills from professor to student. During the past decade, however, several changes in the information environment for basic scientists have created new opportunities for librarians to interact with these scientists, and they have become the rediscovered library users for many health sciences libraries. A 2002 “Informationist Conference” at the *National Library of Medicine* discussed expanding the concept of embedded informationists beyond the clinical setting to the research setting.² Many of the ideas from that meeting have become trends for health sciences libraries in the decade since.

Bioinformatics

In 1997, the 21 original members of the newly formed Molecular Biology and Genomics Special Interest Group of the *Medical Library Association* began to talk about marketing librarian services to laboratory-based library users. Their focus was on teaching users how to search the scientific molecular and genetic databases from the *National Center for Biotechnology Information (NCBI)*, a departure from strictly bibliographic databases. The first library-based bioinformatics service teaching these molecular databases was reported in the literature in 2000.³ Novelties at the time, more and more library positions for researcher bioinformatics support began to be advertised and filled either by librarians with specialized knowledge or non-librarian PhD biologists. By 2006, a special focus issue of the *Journal of the Medical Library Association* published 8 case studies of library bioinformatics services.⁴ Now, this type of position has become *de rigueur* for academic health sciences libraries, and a survey of medical school-affiliated libraries in the *Association of Academic Health Sciences Libraries (AAHSL)* in 2010 showed that 46% of respondents were offering some kind of bioinformatics support, sometimes shared with other libraries or units on campus. Another significant percentage were considering offering such a service in the future, either with a librarian or a non-librarian specialist.⁵ The number of bioinformatics data resources has grown far beyond the publically available NCBI databases to include a number of commercial subscription-based bioinformatics products for statistical analysis or data mining as well as other open source software. Interestingly, the same survey showed that only about 12% of AAHSL libraries in 2010 were coordinating institutional licenses for these bioinformatics databases, so the focus for most is primarily on service rather than an expansion of collection policies to include these new types of resources.

Scholarly Communication Issues

The past decade or so has seen changes in the research publishing environment that have brought basic researchers and librarians together, and health sciences libraries and librarians have been in the vanguard of these trends. The late 1990s rising cost of scholarly journal subscriptions, particularly in the sciences, spurred much discussion of the “scholarly communication crisis” and the sustainability of various models for dissemination of scholarly information. The open access movement grew from the Budapest initiative in 2001 to the Berlin and Bethesda Declarations of 2003 to being a mainstream part of scholarly publishing today. Almost all major biomedical publishers now offer open access journals among their suite of publications and open access options for publishing individual articles. Public access to biomedical research has been a major topic of discussion in the academic and research communities, and several funding bodies now have access policies for research publication. Librarians and researchers have come together in workshops and symposia to discuss these issues at their institutions, and the sharing of information related to these publishing issues has led many researchers to contact their librarians as the identified experts on copyright, journal policies, how to self-archive, and how to access funds for author-paid open access publishing. While this trend does not only involve basic biomedical researchers, they are one of the larger groups impacted by scholarly publishing issues. New roles for collections and liaison librarians and new librarian positions are being created to revolve around publishing and open access issues. Another AAHSL survey in 2010 showed that 75% of academic health sciences libraries are supporting faculty or working with another library or department on campus to support faculty with NIH public access policy manuscript submission, and over 50% of health sciences libraries have at least shared responsibility on their campuses for their institutional repository.⁶ Two other articles in this issue of *Against the Grain* address librarian support for open access policies and institutional repositories in greater depth.

Clinical and Translational Research Institutes

At many universities and medical centers, the building of clinical and translational research institutes funded by the *National Institutes of Health Clinical and Translational Science Award (CTSA) program* has been another occasion of renewed interest in researchers by health sciences librarians. These new institutes pull researchers from the clinical and basic sciences together to foster interdisciplinary collaboration in communication, and faster translation of knowledge from scientific findings to clinical relevance. The research emphasis is new for many libraries that had recently focused many of their new initiatives on supporting clinical care and medical/nursing education. For a while now, health science librarians have been strategizing among themselves about how to work with these institutes. A new Translational Sciences Collaboration Special Interest Group of the *Medical Library Association* was formed in 2011 to help foster these discussions, and a recent short communication in the *Journal of the Medical Library Association* detailed many different library-based support efforts for clinical and translational research.⁷ As they work more closely with clinical researchers, basic science researchers are starting to learn about library services they did not know existed, like the professional-level searching librarians can provide to support grant proposals. Librarians are taking opportunities to communicate the services they can provide to support research design, bioinformatics education, information management, and data management. In fact, this last service, that of helping with scientific data management, is becoming yet another new role for health sciences librarians. The increase in amount of data that researchers in large interdisciplinary groups may generate (sometimes called e-science) and new federal policies requiring data management plans in grants have left many scientists seeking help and expertise in subjects that librarians have continued on page 35

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traditionally understood, like long-term preservation and access issues. Job descriptions of several newly posted librarian positions in the health sciences specify that the librarian will help research faculty create data management and curation plans and identify institutional and subject specific data repositories. A new focus on open data has grown naturally out of the last decade’s focus on open access for research publication. So new are data management services for health sciences libraries that they were not included in the 2010 AAHSL survey of services being offered in health sciences libraries.

Research Networking

The development of clinical and translational research institutes and other interdiscipli- nary research institutes has also been the impetus for institutions to invest in some kind of online research networking tool. These are designed to create profiles of researchers at any given institution by pulling information from publications, grants, and other sources to display research expertise by way of keywords and descriptors. The profiles display research expertise and interest to others inside or outside the institution who may want to set up collaborations. VIVO is one of these tools, and it was developed through a grant from the National Institutes of Health. But research profiling/networking has been discovered by many major commercial vendors, and now several different tools are available by subscription and more are being developed. So far, they have been most popular in medical schools and biomedical research centers. While librarians are not usually involved in the licensing or payment for these tools, they have worked on their implementation to varying degrees with others in their institutions. Librarians can bring to the table their understanding of the workings of bibliographic databases, controlled vocabularies, and research citation, all of which are used by these tools and are important for the accuracy of the research profiles. To the extent that librarians have been able to be involved, they have found these occasions to be opportunities to demonstrate their expertise to faculty and administrators and their commitment to furthering the research missions of their institutions.

Collection Management

The trends discussed here involve new roles for librarians working with basic scientists, but more traditional collections management librarians should not be left out. While, in the past, the basic biomedical sciences collection consisted mainly of journals plus a few books, new types of products have recently become available. In the past decade, laboratory protocols books have gone online to become protocols databases with new bells and whistles. Video protocols databases are a recent new invention. The online versions of reference materials for scientists no longer look like books but have become continually updated databases. In response, librarians find themselves asking questions about their collection policies. Should libraries provide primarily bibliographic information or should they also provide raw scientific datasets? And licensing is another consideration, particularly when vendors unused to working with libraries do not understand library values. How do we encourage licensing that perpetuates the values of information sharing, public access, and interlibrary loan when a product consists of datasets or streaming video? In the case of bioinformatics software and data, only a minority of health sciences libraries have decided to pay for institutional access. More libraries seem to be subscribing to the new protocols databases and hybrid reference databases. Other types of potential library purchases are the numerous new products to help scientists keep up with the scientific literature and manage the vast number of articles they are reading. Many libraries already provide institutional access to reference management software that also allows researchers to store and mark up their pdfs. They are also starting to provide institutional access to new productivity tools and apps that allow researchers to easily access and read favorite journals and other content on their tablets and phones. While some question whether precious collection dollars should be spent on resources that do not provide content, many librarians see providing access to and training on these new tools as a way to demonstrate continuing support and value to the research scientist community.

Conclusion

Today librarians are finding many opportunities for points of contact and engagement with basic biomedical researchers. A recent systematic review of the changing roles of health sciences librarians found that many of the new roles I’ve mentioned here are described in the literature and in recent job postings. A survey of library directors and other librarians in biomedical settings published at the same time by the same authors found that many of the roles for librarians that are “trending up,” that is, more likely to be planned than already in place, relate to support for research. Some of these new roles do require specialized knowledge and new skills, but others use the skills that librarians have always had but may only now be appreciated by these patrons. There can be some tension as librarians begin to negotiate with non-librarians in their institutions as to who should perform which roles. Some of these services might be performed by a librarian at one institution but someone with a different background at a different institution. Health sciences library directors are making individual decisions, based on their situations and budgets, about which of these services their libraries will offer, and librarian roles will look different from place to place. I think that librarians do bring a unique perspective and skill set to all of these different kinds of continued on page 36
roles and that it will be apparent to whomever they collaborate with that they can provide valuable and needed support for the research enterprise.

**Basic Biomedical Scientists ... from page 35**

**Endnotes**


**Fact Box: More about the Homer Stryker M.D. School of Medicine**

Target enrollment is 50 medical students in the inaugural class, increasing to a class size of about 80.

First class begins: August 2014.

The building, widely known as Building 267, was once part of the Upjohn, Pharma-
cia, and Pfizer downtown campuses. It was donated to Western Michigan University by Mattawan, Michigan-based MPI Research in December 2011 for use by the new medical school.

In June 2012, it was announced that the site had been named the W.E. Upjohn Campus, in honor of the founder of the Upjohn Co. and the great-grandfather of MPI’s chairman and CEO, William U. Parfet.

The school received over 3,570 applications to fill 50 spots in its first class.

**Where to Start? Opening Day Collections and Services for a Newly Founded Medical School**

by Elizabeth R. Lorbeer (Library Director & Associate Professor, Western Michigan University Homer Stryker M.D. School of Medicine) <Elizabeth.Lorbeer@med.wmich.edu>

What if you were given the opportunity to build a new health sciences library from scratch? Where would you begin?

I arrived at the end of May 2013 to Western Michigan University Homer Stryker M.D. School of Medicine (WMed) in Kalamazoo to begin work on assembling the new virtual health sciences library for the new medical school. Because the medical school building on the W.E. Upjohn campus will not be completed until July 2014, the new faculty and staff are dispersed throughout the city, in two separate hospitals, a residence hall and the WMed Clinics. The library staff, which consists of the library director and a newly hired medical librarian, reside in the Pediatrics Department.

The new medical school is a collaboration involving Western Michigan University (WMU) and Kalamazoo’s two teaching hospitals, Borgess Health and Bronson Health care. It is a private nonprofit corporation supported by private gifts, clinical revenue, research activity, future tuition from students, and endowment income. This unique setup required the new medical library to be built from the ground up, and seeks out resource sharing options with its partner libraries when possible to support its startup. Unlike other developing health sciences libraries, where there was an existing academic or hospital library to build upon, the WMed library is a wholly separate entity from the academic campus with its own IP ranges, systems, and staff.

Prior to the development of the new medical school, what was in existence was the Kalamazoo Center for Medical Studies, loosely affiliated with Michigan State University (MSU) and now known as WMU School of Medicine Clinics. It had a thriving residency program in which the clinical instructors and residents had adjunct faculty status at MSU’s College of Human Medicine or College of Osteopathic Medicine. This meant clinical faculty had access to library resources remotely, but there was no coordinated library outreach to the Clinics unless the user asked for help. With the arrival of the biomedical sciences instructors and new clinical faculty hires in the summer of 2013, besides myself, none of us had access to a health sciences library collection. New faculty hires were not considered for adjunct appointment to MSU nor were any of us WMU faculty, so this meant quickly assembling an online library collection before fall 2013. It was a humbling experience to find myself the library director of nothing. No Website, systems, content, or staff to manage. A month after my arrival, I went to the Michigan academic health sciences librarians meeting where all the library directors provided an update on their library’s activities. Mine was pretty quick as all I could do was introduce myself and point to myself as literally being the library. I was a practicing librarian without a collection, but in these early days I was able to rely upon PubMed and Google Scholar to complete expert literature searches and retrieve articles through Open Access repositories.

Prior to my arrival to Kalamazoo, I came with a startup plan. My action list included meeting with department chairs, associate and assistant deans, department heads, and greeting new hires each week. I sought out membership to every committee that would accept me which included having input regarding the curriculum, instructional technology, clinical research, inter professional education, and training to interview future students as part of the Multiple Mini-Interview for medical school admission. Most importantly, I made it my mission to market my existence, my skills, and instill confidence in the faculty and administration that I would have a fully functional library ready before the inaugural class started in the fall of 2014.

My professional training and past experiences managing collections prepared me well, and by early August 2013, I was able to quickly launch a virtual medical library using Serials Solutions 360 Core. I harvested Open Access collections and tapped the Michigan eLibrary (MeL) to start with an opening day collection of over 10,000 unique titles. Nothing to boast about yet, as this collection did not fully meet most health professionals’ needs, but it gave me a chance to customize the PubMed interface and Google Scholar search engine with identifiable holdings. Through partnerships with the libraries at Borgess Health, Bronson Healthcare, and WMU, we began to identify content of...
shared interest and when feasible, partnered in resource sharing agreements. Mainly, this consisted of aggregated full-text content or publisher packages. Last, a Get It Now article delivery account was set up to access content not assessable through aggregators or the Open Access repositories. As of January 2014, the library has 69,000 unique titles with an unmediated article demand service. The library’s interlibrary loan system is still under development, but DOCLINE service began in January 2014. I still spend most of my time sorting out configuration issues with the new EZ Proxy software, testing access on multiple devices, browsers, and operating systems, and calling product development teams requesting enhancements for mobile applications.

The electronic book collection is a decent size, for a core medical collection, with over 1,500 core medical titles and access to 14,000 academic titles. I decided early on not to install an integrated library system, as I found the Serials Solutions A to Z list easily located textbooks by keyword searching. Since all the electronic books purchased are treated as titles in a database, it is easy to maintain holdings within the Serials Solutions system. Plans are in progress to pilot a patron-driven system with the hospital libraries to gain access to more book content.

For years, I have dreamt of building an entirely virtual collection free of a legacy print collection and the traditional academic ideal of what a library ought to be. I have always felt constricted by the maintenance of physical objects and space, and prefer the fluidity of electronic information and being able to move about my community to provide information services. At our medical school, medical education has been transformed from traditional lecture-based learning and students are now part of team-based learning communities. We teach students how to access and sift through volumes of biomedical information quickly using tablets and smart phones. WWMed adopted the Apple iPad to distribute content for the new medical curriculum. Everything we do has to be accessible and usable from the iPad. Class textbooks are purchased through Inkling.com, besides instructors creating their own Apple iBooks to replace traditional class lecture notes.

Many of my colleagues ask if there is a physical space for a library at the new school building. The answer is yes, with an adjoining information common, but no physical space for print material. The library space is fluid in which the students pass through as they move back and forth between the main lecture hall and their learning communities. This is prime real estate in the new school building and a gift from the Dean who strongly supports library services.

Through this entire experience of building a new library, I took advantage of several opportunities that arose. First, I happened to be tapped to help with the student admissions process. Each month I have the opportunity to meet candidates on interview day, to introduce myself and talk about the new virtual library. It has been a tremendous opportunity to discuss my ideas and get feedback from the candidates besides writing a monthly column in the admissions newsletter on the library’s progress. I feel that I am creating a connection with the incoming students even before they arrive and I know this plays a role in ensuring the library’s fledging success. My office is conveniently located in the Clinics, and I am often tapped to provide brief updates on library development at journal clubs, morning reports, grand rounds, and noontime meetings. I contribute content to the School’s social media outlets, internal and external newsletters, and recently asked to create a learning module about the library which all employees are required to complete each year. I am trying my hand at lecturing at an upcoming grand round on research literacy. In a survey taken at our last strategic retreat, development of the medical library rated at the top. I jump at every possible opportunity to embed myself continued on page 38
in the new school going beyond the traditional boundaries of a librarian as I am committed to the success of the new school.

Right now, the library is focused on building virtual reference services utilizing Web conferencing tools, SpringShare online chat widget and individual consultations in the Clinic, student learning communities, and future laboratory and simulation spaces. The WMed librarians, with their hospital librarian partners, frequently make house calls to clinical faculty and support staff to address individual information needs. It is common for the librarians to provide services at multiple locations, equipped with tablets and laptops to quickly support the needs of users. There are no traditional reference hours or desk; the librarians are available on demand during clinic hours both in person and virtually.

My library’s motto is “Climb to the top.” My five-year-old daughter came up with this phrase one summer evening as I was working on the library’s marketing plan. She drew a picture of a tree with several happy stick figures dancing around the words she inscribed. Every day I look at her picture and it inspires me to build the very best library for my users that I know how.

Disruptive Technology: Librarians Must Think Heretical Thoughts to Adapt
by Michelle A. Kraft (Senior Medical Librarian, Cleveland Clinic Alumni Library) <kraftm@ccf.org>

The sun is setting and it is getting a little difficult to see as darkness falls. Without even thinking I walk over and flip a light switch and I am able to see everything to continue working. Light has become so commonplace I don’t even realize how much we rely upon it until it is gone. Power outage, camping, or a quick late-night trip to the bathroom, make me realize how this common item has become integral to our society. Yet this wasn’t always the case. Before the common light bulb, people were only able to see in the dark using candles, lanterns, and gas lamps. None of those items produced much light nor were they easy to turn on with the flick of a switch. The light bulb made it possible for people to work after sunset, travel a little safer in the dark, and it eventually led to the invention of the electric power plant. Disruptive technologies change the very way society functions, altering the way people do things, their perceptions, and expectations. The light bulb was a disruptive technology. It has changed society’s perceptions so dramatically that light at night is considered a common expectation.

Just like the printing press allowed books to be mass produced and allowed for scientists to easily share their knowledge through scholarly journals, the Internet and personal computers further democratized knowledge and information far beyond books, journals, and other printed material. Tutorials, speeches, images, animation, etc. are all available online. Professionals were no longer necessary for publishing and mass distributing information; the average person could publish and distribute anything online for the masses. The personal computer provided the ability to access information on a much wider scale than the printing press but it was not mobile. While the laptop provided a bit of mobility, people didn’t have it constantly on and next to them as they moved about the day. The smart phone and the tablet changed that.

Our library patrons not only have the ability to access information on the Internet but now truly they can, and do, do it any time and any place. The smart phone has changed the way people communicate, eat, work, play, and find information. Text and data usage continue to grow while talk minutes continue to shrink. People now comparison shop for items on their phones while they stand in the aisles of stores. Maps and printed directions are replaced by smartphones, speaking directions to drivers. People want to download electronic books to their mobile devices and they want them at all times, the ability to get information is easy and always possible.

What it Means for Libraries and Librarians
We as librarians need to re-think the way we have been providing resources and services. Our patrons are more mobile and connected. Simply having a Web presence is not enough. We need to look at how our patrons access and use information and we need to provide it in those ways. Five years ago, electronic books and electronic journals were easily accessible to people via their desktop or laptop computers. Now, the preferred methods of access have changed. People want to download electronic books to their mobile devices and they want to highlight and take notes in those electronic books. Apple Insider reports a survey by Black Book, that fifty-one percent of “office-based physicians said they use a mobile device to perform independent medical reference and Internet research.” In a ComputerWorld article on the iPad Mini, one doctor describes his iPad as “full of medical apps for ultrasound regional anesthesia, anesthesiology textbooks, and medical calculators.” Boruff and Storie surveyed medical trainees, graduate students, and faculty members on the use of smartphones and tablets to answer clinical questions and

continued on page 39
find medical information. The results from 1,210 respondents led Boruff and Storie to conclude that various technological and intellectual barriers do not appear to keep medical trainees and faculty from using their devices to find information. However, access barriers and lack of awareness "might keep them from using reliable, library-licensed resources." With the emergence of medical apps that provide drug information, guidelines, textbooks, and journals our patrons now have the ability to bypass our electronic front door, the library Website, for services and resources. Use of tablets by physicians doubled in 2012 and use by clinicians probably continues to grow. This trend is also changing students’ perceptions of textbooks. A survey from the Pearson Foundation revealed that a majority of college students prefer digital books over print, and both college and high school students believe tablets will effectively replace textbooks within the next five years.

This presents a challenge for librarians because so much of what we do is creating easy access to information. We have made it so easy that many patrons do not realize their electronic journals, databases, and other resources are available because of the librarian. This does not mean that librarians should stop making things easier to use and find. On the contrary, our patrons already think Google is easy. We not only need to make our resources easier than Google, but we need to rethink how we provide services and resources and adapt to the changes technology has brought to society. History is full of professions that faded away as technology changed society. The switchboard operator, milkman, newspaper industry, reporters, and the postal service all have seen their industries drastically change as a result of technology and evolution of society.

As society has evolved, it has changed the way people do and perceive things. The word “Google” has evolved to be more than just the name of an Internet company. It has become a verb, used to indicate somebody searching for information on the Internet, just as “Xerox” was once a popular term used to indicate somebody making a photocopy. Patrons have changed the way they find information and librarians need to reorient every service and resource with future in mind. This means that traditional services, resources, and job duties that librarians were taught in library school may also need to be examined. The library catalog, information desk, instruction, tables of content services, acquisition, etc. are all traditional staples in the library and eliminating them might be considered a type of librarian heresy. However, librarians must think these heretical thoughts to adapt to changes.

The Uniqueness of Librarians and the Need to Rethink Services

Since most people can Google a question and get an answer, what makes librarians unique and important to their patrons? Librarians provide more in-depth, customized, help, and relevant information to their patrons than a search engine. The interactions between librarians and patrons are important to the future of librarianship. Librarians must ask the question, “What job duties take up most of my time that are not directly working with the patron?” Then they must ask the more difficult question, “Are those duties really essential?” The answer to those questions will vary between libraries and library staff. Part-time solo hospital librarians may find themselves spending too much time trying to catalog and process books. In that case, the hospital librarian may wonder whether it is necessary to even have a library catalog given the size of the collection and patron usage and browsing patterns. Perhaps a Web-enabled spreadsheet or a LibraryThing organizational account may adequately fill the role of a traditional catalog. Larger academic medical librarians have already begun to question the concept of maintaining and staffing both a reference and circulation desk, many have already merged the two desks into a single service desk or eliminated the reference desk entirely by having reference librarians available by appointment. Part of a service desk at Lamar Soutter Library (University of Massachusetts Medical School, Worcester, MA) was eliminated in order to support a new model of blended librarianship, one that is not bound by the traditional library or library professional. The evolution of the reference desk to single service desk at Jane Bancroft Cook Library (a shared resource of New College of Florida and the University of South Florida) eventually led to the elimination of the circulation department. The circulation department’s staff shifted to focus on interlibrary loan and expanding into document delivery, something that had previously been impossible due to staffing arrangements.

Sacred Cows and Heretical Thoughts

A recent discussion of medical librarians on Twitter focused on the “sacred cows” of librarianship, services or resources once so important and ingrained in library tradition that it is unthinkable to eliminate them. Yet these librarians discussed the unthinkable and the heretical librarian thoughts did not just stop with the idea of removing the reference desk. Some discussed eliminating regularly scheduled educational classes in lieu of customized classes scheduled by appointment or online only classes. The idea of moving to only an electronic book and journal collection was discussed. Other collection development ideas discussed included moving to patron-driven acquisition, thus switching the power of purchasing books from the librarian to patron.

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People Profile

Senior Medical Librarian
Cleveland Clinic Alumni Library
9500 Euclid Avenue, Cleveland, OH 44195
Phone: (216) 445-7338 • Fax: (216) 444-0271
<kraftm@ccf.org> • http://portals.clevelandclinic.org/library/

Michelle Kraft

BORN AND LIVED: I was born and raised in St. Louis, MO but I have lived in Cleveland, OH for 15 years.

PROFESSIONAL CAREER AND ACTIVITIES: I work trying to provide resources to the Cleveland Clinic Alumni Library and the other regional hospitals of the Cleveland Clinic Health System.

FAMILY: My husband Mike and I have three kids and a dog who keep us very busy.

IN MY SPARE TIME: I spend a lot time with my family, watch SciFi shows, swim, and during football season I go to Cleveland Browns games and I obsess over fantasy football.

FAVORITE BOOKS: Primarily SciFi books.

PET PEEVES: Whining.

PHILOSOPHY: Figure it out. Don’t wait for things to happen, make your own opportunities.

MOST MEMORABLE CAREER ACHIEVEMENT: Representing and serving MLA (Medical Library Association) membership as an MLA Board Member and soon as President elect.

GOAL I HOPE TO ACHIEVE FIVE YEARS FROM NOW: Become the director of a medical library.

HOW/WHERE DO I SEE THE INDUSTRY IN FIVE YEARS: I see librarians getting out of the library and embedding library resources into everyday technologies and processes of the university or hospital environment. Librarians will be focused on partnerships and will provide more information outside of the library building.

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Change is scary. Thinking heretical library thoughts by evaluating the library’s sacred cow services and resources is even scarier. Many of these items were woven into the fabric of librarian education as librarians pursued their degrees. Ten years ago the thought of eschewing a library catalog for a simpler system would have been difficult to envision. It would have been unthinkable in the 1980s when it seemed the goal of every library was to have an Online Public Access Catalog (OPAC). While technology has made some services and resources outdated it has also provided librarians with opportunities to adapt to those changes. The library’s electronic resources have made the library available outside of the walls of the library, enabling librarians and patrons to access them anywhere any time. In the past librarians participating on rounds would have had to scurry back to the library to do the research; now they can pull out their tablet and find the answers within minutes. Electronic medical records provide caregivers with access to patient health information. Librarians working with the electronic medical record team have been able to set up evidence-based resources within the electronic medical record. This opportunity for providing library resources at the point of care would not have been possible without advances in technology.

Heresy or Evolution?

Heresy can be defined as any belief that is strongly in opposition with established beliefs or customs. Disruptive technology changes society and as a result established beliefs and customs change as well. Therefore, is it really heresy for librarians to question and examine long-established resources and services, or is it evolution brought on by technology? While rethinking the validity and usage of library resources and services may be considered heresy to some, it is actually evolution. All professions must evolve with society and technology. Librarians are no exception. Accountants use computers and financial programs to conduct business; they are not using an abacus. Librarians must think of disruptive technologies as opportunities. They provide librarians the opportunity to shape their destiny by providing tools and services that are now possible due to technology.

Evolution is not perfect. Not every change brings about a positive result. Mistakes will be made. However, “Failure is not fatal, but failure to change might be.” – John Wooden, former UCLA basketball coach.

Endnotes


You Gotta Go to School for That? — The National Media Market: Screening Films on a Real/Reel Screen

Column Editor: Jared Alexander Seay (Reference Librarian and Head, Media Collections, Addlestone Library, College of Charleston, Charleston, SC 29424) <seayj@cofc.edu> blogs.cofc.edu/seayj

just prior to being swept into the glory that is the Charleston Conference this year, I attended the National Media Market in Charleston, South Carolina on November 3-7. The NMM actually overlapped the Charleston Conference by a few days, thus further complicating my decision about which conference’s interesting and gala events to attend.

The National Media Market is in its 35th year of bringing together educational film producers and distributors to connect with librarians and media professionals. Other technology-related companies attend as well, including media management and captioning and description services. This is not a film festival. As Ursula Schwarz, executive of the National Media Market says, “This is a film screening and buying event.” As the Charleston Conference brings together librarians and publishers to engage and exchange ideas on a level playing field in a stimulating atmosphere, so the National Media Market does for librarians and other media buyers and vendors in the film production and distribution industry. This year Schwarz coordinated with executive director Katina Strach of the Charleston Conference to bring the NMM to Charleston just ahead of the Charleston Conference.

It is nice to attend a conference and be pleasantly blown away by concepts and ideas. The Charleston Conference never disappoints in this regard. However, the NMM was all the more amazing to me because I went to this conference as a bit of a cynic about the whole idea of what (I thought) the Market was about. Why, in this era of online Amazon ordering, do distributors and buyers of media even need to gather in one physical location to view and buy media? Why indeed? This National Media Market experience showed me how misguided my thinking was.

Unlike a traditional conference one would find in a conference center, the National Media Market is held in an all-suite hotel. This allows each exhibitor a space to set up individual, semi-private areas that allow preview stations for on-demand screening of their titles. More importantly, these suites allow spaces for the exhibitors to personally engage librarians and other current and potential users of their ser-
whom I had talked on the phone or exchanged sit down with these people. Say what you will library with media. It was refreshing to see and I talked to several exhibiters who supply my like being in a candy store (especially when practical justice.

intimate, and focused atmosphere, the one-on-one get to know each other. “Networking” is talk pricing, learn about services, and gener-

ities. Thus it was that, after I passed through the registration table at the Embassy Suites Hotel, I looked up into the lobby atrium to see the numerous exhibiters nestled in their suites in the balconies above. Each exhibitier really did have their own nest up there.

These exhibitier “nests” are the heart of this conference experience. For the four-day duration of the conference each exhibitier (there are always a maximum of 55 of them) occupied suites on two floors overlooking the atrium. At any time the suites are being visited by “buyers” — media librarians and representatives from educational institutions — to view videos, talk pricing, learn about services, and generally get to know each other. “Networking” is such an overused term. But, in this relaxing, intimate, and focused atmosphere, the one-on-one personal interaction really does the word practical justice.

As a film buff, going from suite to suite was like being in a candy store (especially when their suites were well baited with real candy). I talked to several exhibitiers who supply my library with media. It was refreshing to see and sit down with these people. Say what you will about the power of online networking, but human contact is the true sustaining inspiration. It was powerful to finally meet in person those to whom I had talked on the phone or exchanged emails with for months.

Finally leaving the nests, I ended up in a session: “Video at Risk: Strategies for Preserving Commercial Video Collections in Research Libraries.” Well presented by Howard Besser of New York University and Walter Forsberg of New York University Libraries, the presenters discussed their NYU studies that show — as all media librarians already know anecdotally — how a significant number of their libraries video collection contains VHS titles, and most of these are out of print. They outlined how they went about getting the hard data for their findings. But, what to do? So, they unleashed the practical gold. They have published (and made available online) guidelines for dealing with Section 108 of U.S. copyright law. Somebody hold me back, please. How long have we needed that?

Specifically, they deal with the library ex-

ceptions in Section 108 that allow a library to make a copy of a work. Issues the guidelines address include when a title is considered “damaged,” when a format is really “obsolete,” what constitutes “replacement, and “can replacement copies be circulated.” They also address (that media librarian sticky wicket) what qualifies as “reasonable effort.” There are eight specific guidelines including best practices. You can access the guidelines online by searching “Video at Risk NYU.” But, please finish reading this article first.

The crowning jewel of the NMM is certainly Market Mania. As most experiences go, this one really has to be experienced. But, I shall attempt an explanation. Market Mania is billed as a place for the participating exhibitiers to highlight their stuff. Each exhibitier gets seven minutes to showcase their services and newest releases. Though some of the exhibitiers did provide a speaker to talk up and explain their (usually new online) services, most of the seven minutes per exhibitier were dedicated to trailers. With 55 exhibiters represented, this session lasted more than six hours, not including time for breaks and lunch. I hear you say incredulously, “trailers?” You bet.

Now, admittedly I am a sucker for watching trailers. In fact, I consider the 20 minutes of trailers shown in most movie theaters prior to the main feature as an essential part of the experience. I was enthralled. These were documentary films for the most part, and nearly every single one was powerful and emotional. Maybe you can chalk it up to watching on the big screen with surround sound, but I was fixated and without a dry eye most of the time. As I sat there being drenched in these emotionally powerful films, I wondered if I would have had the same emotional reaction or attachment, or even interest, if I had been watching at work from my desktop. I was after all just watching trailers. The answer is probably not.

Let me be clear. While I am a raging, sentimental romantic at heart, I am all about practical application and doing “what works” and certainly what is logistically easier. I rarely “screen” titles prior to purchasing for the library anyway. But, I have the ability to do so from my desktop if I want. So, why would
Op Ed — Little Red Herrings

Is the Google Book Decision an Unqualified Good?

by Mark Y. Herring (Dean of Library Services, Dacus Library, Winthrop University) <herringm@winthrop.edu>

Unless you’ve been living on a deserted island or stranded (or not?) like the pelagic castaway Jose Ivan (http://bit.ly/1fq6JsJ) for over a year, you could not possibly have missed the news that Google’s mass digitization project, Google Books, won its case.

The short version of the story is that about eight years and millions of dollars ago, Google partnered with first a half-dozen or so major research libraries to scan all their books. This move was not an ill-conceived, off-the-cuff decision. CEOs Page and Brin wanted to do this — scan all the world’s books — back when Google was called BackRub. Over time, those half-dozen libraries became a dozen, then two dozen and finally closer to three dozen major research institutions. Some libraries, however, had second thoughts and dropped out. Google decided to scan everything — in toto as academics are wont to say even when not referring to the Wizard of Oz — (http://bit.ly/1brG0Kg), from the title page to the back matter.

Some authors didn’t much care for this opt-out approach and said so. The Authors Guild (https://www.authorsguild.org) reminded Google about this little thing we call copyright, but Google being Google (and having a googol (http://mathworld.wolfram.com/Google.html) dollars at its disposal) ignored the reminder, and the matter went to court — for the next eight or so years.

Judge Denny Chin (https://www.google.com/igq=Denny+chin) on the U.S. Court of Appeals for the Second Circuit, held the matter and, after numerous fits and starts, decided in November 2013 to give Google the win. The matter is under appeal by the Authors Guild (http://cnet.co/1gg1Mg).

What Google won was the right to display the snippets it shows of materials that are copyright protected (anything in public domain is shown in full). Google did this without permission and without any remuneration to those holding the copyright, whether authors or publishers. Chin agreed with Google that the snippets were “fair use,” something many did not see coming, but most hoped would be the outcome. (Left undecided was Google’s decision to scan cover-to-cover all those books without permission.) While “fair use” has long been a staple of what libraries are able to do with materials, this is the first such case in which a commercial enterprise has been able successfully to claim fair use of an enormous amount of material without asking for any permission, written, verbal, or otherwise. Fair use appears in Section 107 of the U.S. Copyright Law of 1976 and can be viewed here (http://www.copyright.gov/title17/): in its confusing and inglorious entirety.

When the decision came down, the twitterverse, as it is apt to do, went all atwitter. It “exploded” as the phrase has it. For example, here (http://waupo.st/1BfzLP), here (http://nyti.ms/1d-qYAh), here (http://bit.ly/1eyCwLC) and here (http://reut.rs/1eUdOK) are a few of the hundreds of gleeful comments. Even librarians (http://bit.ly/1c4Dppn) were in a lather of joy about it.

Almost. Not this librarian, although I know I’m in the minority when I say it. The Google Book Decision — what a publisher friend of mine likes to call “Google Book Theft” — gives me pause for a number of reasons.

First, it turns copyright and fair use on its head. Copyright is already upside-down, and this hasn’t helped. Now the matter is nothing short of vertiginous. To say anything is NOT fair use now will be a real challenge. Many of you are doubtless thinking that would be a good thing. But no, Martha, it would not. Of all the things that can be said bad about our copyright laws — and there are thousands of things I can think of in sixty seconds — they still protect intellectual property. Determining what fair use is now is anyone’s guess. Everything is, is the way I read it now (and I bet Google does, too). Furthermore, this will provoke Congress to reexamine copyright, something it has done about a half-dozen times in my lifetime. And, yes, they have made it worse each time. When Congress touches copyright, the old joke about the opposite of progress is congress, really hits home.

Second, there is no evidence, no empirical evidence, that shows any additional Internet exposure of any authors’ works improves royalties. Of course, no academic expects (or should expect) to make any “real” money writing for academic presses. Those that can be named — Bloom, Edgar — can be named because they are so few in number. But to take away from academics any chance to improve those anemic bottom lines seems cruel, especially when Google with its gazillions could easily have shared (instead of giving it to lawyers). To test this idea, look at what the Internet has done to music. Sure, any group can get a million hits with even a so-so song. But those million hits and $5 still won’t buy you a cup of coffee at, well, at you know where. Likewise, authors will now get more exposure but that will not necessarily turn into more sales. I won’t say that’s QED, but it comes pretty close.

Third, this gives the information-wants-to-be-free crowd (i.e., most of cyberspace) a stranglehold on all intellectual property. This group believes what is yours is theirs, and what is theirs is theirs, a kind of socialism of information (and we all know how well socialism works). They shouldn’t have to pay for any information because it should all be for the common good. All of it. This sounds really good until all of a sudden, that textbook you wrote that sold a few thousand copies is now everywhere, or that rubric you created is now in 5,000 schools, all courtesy of the Internet, or that cloning technique you worked years to perfect is now everywhere you look online, all without any reference to you or the hand you had in it. It’s one thing when you do this yourself; it’s quite another when someone else does it for you without asking. That sounds very self-centered, I know, but it isn’t as if good ideas are superfluous. I’m not saying we do not need reforms in the whole information access calculus. But this one isn’t so much a reform as an unhinged revolution. Those can be fun, too, until they start shooting at you.

Lastly, the decision simply adds to the UGC — user generated content — that Google has expropriated. Again when we do this voluntarily, no one should complain. But for Google to decide that copyright does not apply to what it wants to do is mind-boggling. It is doubly so, since Google kowtows to the demands made on it in Europe, and especially in places like China. Here, however, intellectual property is meaningless and merely another potential revenue stream. Google takes what it finds and makes it “free” to the world. The “free” refers to what Google pays for the idea, not what it makes back from all those ideas.

So, is the Google Book Decision an unqualified good? Certainly it is continued on page 43.
The Radiology Legacy Collection, more than 75 years of Radiology history at your fingertips, is now available! Instantly search hundreds of articles dating all the way back to 1923. Make the Collection yours at RSNA.org/Legacy.

Order Today! Pubs.RSNA.org

Op Ed — Little Red Herrings from page 42

for Google. For intellectual property, not so much. For small- to medium-sized publishers, again, not at all. For discovery of materials, yes and no. Yes, because they can be found; no, because they are likely to be lifted, for free, or you’ll get a snooty email asking why you’re a stinking, dirty, money-grubbing capitalist. (And for your information, all those billionaires in Silicon Valley are not capitalists; they just got rich quick, that’s all!)

In a sense, we all work for Google now, free of charge. I suppose that fits since we all now attend the “University of Google,” right? 🤔

You Gotta Go to School for That? from page 41

I want to spend the time and money to travel somewhere just to “screen” films when I can do it from the comfort of my office computer screen? This experience at the National Media Market answered that question for me.

I suppose I’m making a case for the film “experience.” I’m trying to say that viewing a few seconds of a film from one’s desktop is not really “screening” a film. The fact is that randomly reviewing films from my desktop cannot hold a candle to sitting in a screening room with an audience and getting the full film experience. There really is a big difference between watching a film, even a trailer, and experiencing a film in its natural environment on the big screen with a big audience.

Of course we often have to make buying decisions based solely on reviews or the few minutes we can give to online trailers. So, yes, one can get an idea of the worth or appropriateness of a film title by a quick desktop trailer. We have to do that most of the time. But, I posit that we media librarians (dare I say “film” librarians?) cannot fully grasp the medium we cherish, promote, and nourish without being regularly washed in the real/reel thing upon occasion. Just as one cannot live on fast food alone, one should spend at least one week a year savoring a full film meal at the National Media Market. Next year it is in Charleston again just ahead of the Charleston Conference. Certainly, this is yet, another reason to come to Charleston early. 🎥

Rumors from page 22

Speaking of the Charleston Conference, the Call for Preconferences at the 2014 Charleston Conference is out. And the Call for Papers opens tomorrow! Get on the stick! Time’s a wastin’! http://www.katina.info/conference/call-2014-preconferences-now-open/ and http://www.katina.info/participate/call-for-papers/

The 2014 Charleston Conference program is shaping up! We can let everybody in on a few things.

First, the fantastic Anthea C. Stratigos will be our main keynote speaker. We mentioned Outsell’s End-User Study of Faculty and Students above in this issue. Ms. Stratigos is co-founder and CEO of Outsell, Inc. (founded in 1994), a leading research and advisory firm that focuses exclusively on the information and publishing industries, providing analysis and recommendations for high-level executives regarding markets, trends, benchmarks and best practices. Anthea is Outsell’s primary spokesperson, and chairs Outsell’s Leadership Council, a member-service for CEOs and senior executives of publishing and information-provider firms. Ms. Stratigos holds a B.S. degree in Communication from Stanford University (1983) and graduated from the Executive continued on page 47

Reviewed by Debbie Vaughn (College of Charleston) <vaughnd@cofc.edu>

For the past two years, I have been teaching a learning skills class via distance education. When I taught this course in a brick-and-mortar setting, we spent at least one — but sometimes two — class periods in the library covering topics such as interpreting search results, evaluating sources, and other information literacy concepts. Moving to the online environment has been difficult for me, and one of the biggest challenges that I’ve faced is determining how effectively introduce students to campus services and resources (including, of course, the library), virtually. As any instructor strives to keep up with best practices in pedagogy, I have immersed myself in books, articles, and blogs about teaching and learning strategies in the “click classroom.” In the process, I have followed news and developments in higher education and savored the dialog struck between advocates and opponents of online education, MOOCs, for-profit institutions, and other opponents Viewpoints-worthy topics.

Frederick Stielow has written a pivotal book addressing the way the library can and needs to remain relevant in the growing enterprise of online education. *Reinventing the Library for Online Education* offers an informative overview/history of online education, the library’s role in this mode of course delivery, and the demands of online library personnel.

He also gives what he calls “commentaries” on a variety of library services, methods of operation, and systems. Stielow breaks down these commentaries into three groups, subsequently defining services, systems, and modi operandi as those that should be eliminated, redefined, or constructed.

No doubt, Stielow’s experience and credentials make him the perfect author to tackle the subject. He has served as department head, library dean, public library system director, and professor. He has authored numerous books on archives management and virtual libraries. Perhaps most impressive is his post at the American Public University System (APUS), where he is vice president and dean of libraries, electronic course materials and APUS ePress. It should be noted that APUS is an entirely online enterprise, and Stielow has grown its library into a model for supporting and partnering with online learning endeavors. In fact, in February he was named as this year’s Routeledge Distance Learning Librarianship Conference Sponsorship Award recipient; his prize will be presented at the ALA Annual Conference in Las Vegas. In her letter of nomination, Susan Hyland, AVP of Library Operations at APUS, aptly summed up Stielow’s accomplishments: “As head of APUS’ virtual library services, this visionary has long been at the forefront of a revolutionary transition — successfully moving distance learning librarianship into center-stage in the new world of online universities… The APUS Online Library moved from marginal to a position of sustainability.”

*Reinventing the Library* is a bit richer and more philosophical than many books on library issues. It’s also written with non-traditional formatting — not quite as dramatic as Jennifer Egan’s Pulitzer Prize-winning novel *A Visit from the Good Squad* or Mark Danielewski’s *House of Leaves,* but the pages are filled with kickers, text boxes, and bullet points.

Stielow explains that this is intentional: “it reflects the Web’s unfolding impact on written communication” (xv). It forces the reader to think and learn about the library as it pertains to online education as though the reader has been dropped into online education’s native habitat. “See also” references act as print hyperlinks and encourage the reader to explore content in a non-linear fashion. The only thing that would bring the reader closer to the native habitat would be to offer *Reinventing the Library* in online course format. Even Stielow’s colophon is also creative. Traditionally, of course, the colophon is a simple closer, identifying the font, spacing, paper type and other specifics of a publication. The bones, if you will. Stielow lauds the bones of his publication: APUS, its library, and growth of Classroom/Research Information Services, Electronic Course Materials, and other initiatives.

*Reinventing the Library for Online Education* is a fascinating read. It is eye opening and thought provoking for library personnel supporting online education endeavors, faculty teaching online courses, and higher education administrators. In fact, it would be a good idea for all senior academic affairs administrators to take a look at this timely work, whether or not their institution’s online education is currently booming — because if it isn’t thriving now, it is likely that soon it will be.

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**From the Reference Desk**

by Tom Gilson (Associate Editor, *Against the Grain,* and Head of Reference Emeritus, College of Charleston, Charleston, SC 29401) <gilson@cofc.edu>

*Berkshire Dictionary of Chinese Biography* (2014, 9781933782669 $595) is a three-volume set structured using a chronological approach as it offers one hundred thirty-five biographies of influential figures in Chinese history. The set is edited by Kerry Brown of the China Studies Centre at the University of Sydney and draws on the knowledge and expertise of an international list of more than one hundred contributors. Coverage spans the time periods from the early Xia Dynasty (2100 BCE) through the Tang (618-907 CE); the Song Dynasty (960-1279) through the Ming (1368-1644); and the Qing Dynasty (1644-1912) up to People’s Republic and the modern opening of China in 1979. There is also a volume 4 (2014, 9781614729006, $175, pre-publication price) set for release later this year that will bring coverage to the present.

While this is a biographical reference, the focus is on more than biography. The goal of the set is not only to provide facts about the lives of leading figures. The attempt here is to use these biographies to provide readers an understandable context from which to view the whole of Chinese history.

The entries are substantial and range from shorter sketches of 1,000 words to full-blown essays that come in at close to 8,000 words. Coverage includes both well- and lesser-known figures and features scientists and inventors, philosophers and religious figures, dynastic rulers, statesmen and military leaders, as well as poets, authors, artists, and scholars. As one might expect, the vast majority are men but some prominent women are covered. Each entry has a similar structure that provides continued on page 45
the subjects dates, their role, and a brief summary of the person’s life and importance. This is followed by the text of the article enhanced by relevant sidebars and visuals including maps and a portrait of the subject. All articles end with a list of primary and secondary sources for further reading and exploration.

The articles are written in an accessible, reader-friendly style but grounded in academic scholarship. The biographies are both factual and evaluative including accounts of the life and achievements of the subject while at the same time offering assessments of their influence. But perhaps more importantly, reading these entries gives a sense of the historical context within which the person lived. References are continually made to the time periods being discussed and readers can use the chronological table of contents and list of articles to place each time period within an overall historical framework. Added to this is a helpful chronology of events for all time periods covered. Other aids and appendices include a listing of entries by subject, a short pronunciation guide to Mandarin Chinese, and a conversion table between pinyin and Wade-Giles transcription systems, an index of Kings, Emperors, an index of geographical locations and other rulers, and a general index. In addition, there is a glossary of pinyin terms, a bibliography of standard references and resources, and a list of all of the prominent people mentioned in the set with those having articles devoted to them in bold.

The Berkshire Dictionary of Chinese Biography reflects a rich but complicated history stretching back to 2100 BCE and does so in a way that enables the non-specialist to locate not only the biographical facts but grasp the broader context of the lives being discussed. While there have been other biographical works on specific dynasties and time periods, this set is unique in that it provides life accounts from all eras of Chinese history while simultaneously offering a framework from which to view the overall history.

With its scholarly approach, the Berkshire Dictionary of Chinese Biography is a natural fit for academic libraries but it will also appeal to larger public libraries where there is patron interest. Libraries that already have the publisher’s well-received five-volume Berkshire Encyclopedia of China (2009, 978-0977015948, $675) will definitely want to consider this new set. It will prove a valuable companion and supplement to the older, well-established reference.

Digital editions are available via major eBook and database services and a print/digital bundle is being offered in cooperation with Credo Reference.
are informative, well researched, and free of jargon. Multiple audiences from students and researchers to bloggers and journalists will find it a valuable resource to get relevant facts and solid background.

The Encyclopedia of Military Science is an impressive effort that offers readers a comprehensive perspective on a multifaceted topic. It is much more that a collection of articles dealing with the nuts and bolts of military strategies and operations. Editor G. Kurt Piehler and his contributors have fashioned a reference that looks at the American military using a wide open lens providing insightful and factual observations. Academic libraries and larger public libraries will want to give it serious consideration. It may even find its way on to some high school library shelves.

The set is also available online via SAGE Knowledge at: http://knowledge.sagepub.com/view/encyclopedia-of-military-science/SAGE.xml.


Abandoning the chronological arrangement of the first edition, this set opts for a framework that divides coverage among six major categories starting with causes, processes, and patterns then moving on to the history of immigration from the earliest Spanish settlers to post 9/11. The third section consists of entries dealing with the numerous themes related to society, culture, and politics. This section is followed by two sections that offer articles discussing nations of origins and U.S. Destinations and those covering international perspectives. The set ends with a collection of 80 documents and primary sources that complement the other entries.

The thematic structure works well for this set giving readers a built-in context along with the related detailed information. However, an arrangement like this requires good indexing and finding aids. Fortunately this set possesses them. Each volume starts with a complete listing of contents for the entire set and there is a well-designed and thorough general index at the end of the last volume. In addition, there is an index to the numerous tables and figures that are interspersed throughout the set supplementing and informing the text. Each entry provides lists of further readings, and there is a collected bibliography as well as a glossary of terms adding value to the set. The entries are informed by recent scholarship and are written in a style that is appropriate for upper division high school students, undergraduates, and interested lay readers.

American Immigration: An Encyclopedia of Political, Social, and Cultural Change treats a seminal topic in the American experience that has historical importance as well as current relevance. Examining this encyclopedia makes it clear that successive waves of immigration have been essential to the development of the United States. The set also portrays immigration as a multifaceted phenomenon with complex ramifications that can be viewed from multiple perspectives. It is a compliment to the editors and their contributors that American Immigration... does so in a factual, scholarly fashion providing readers a valuable source for further study and understanding. This encyclopedia should find its way on to the shelves of college and high school libraries as well as many public libraries where there is interest.

This title is also available via Sharpe Online Reference (http://www.sharpe-online.com/).

The European Union Encyclopedia and Directory 2014 (978-1857436990, $895) is the latest version of a standard reference that made its first appearance in 1995. Published by Routledge, this one-volume work has evolved into an annual publication that provides information on both the EU’s history and its current operation with an emphasis on facts and details.

The new edition continues the basic structure of past editions starting with an A-Z list of entries that offers factual discussions of the numerous EU institutions and operations, the member nations and those that are applying for, or are considering membership, as well as other countries that have “relevance to the Union.” Brief biographical sketches of key individuals who have been influential in the development of the EU are also provided. Lending a sense of context are essays that offer updated background on the EU and its legal framework, economic concerns, social issues, external relations, migration and asylum policy, future prospects, and the continuing discussion of membership enlargement. There is also a new essay on environmental policy. These essays are followed by the Directory of the European Union that has a section on each institution of the EU including the Council of the European Union, the European Commission, the European Parliament, and numerous other EU agencies. The information provided in this section includes addresses, phone and fax numbers, email and Web addresses, and information on officers and their work. The book is rounded out by a statistical survey of the EU with population figures and various economic indicators and statistics.

The single-volume European Union Encyclopedia and Directory 2014 is unique in the amount of information that it provides on the EU. With its combination of encyclopedic entries, involved-essays, directory information, and statistical tables, this reference provides interested students and researchers with an authoritative, comprehensive, and balanced resource. The main audience for this work will be academic libraries and businesses and government agencies concerned with EU related issues. However, given the cost of the book those on tight budgets who have the 2013 edition may want to wait for the 2015 edition due in November of 2014. It does not appear to be available online.

Extra Servings
April 2014 sees CQ Press publishing a couple of references that will be of interest.

• Political Handbook of the World 2014 (978-1-4833-3226-7, $375) by Thomas Lansford has “more than 200 entries on countries and territories throughout the world,” with “coverage of all major and minor political parties and groups in each political system. It also provides names of key ambassadors and international memberships of each country, plus detailed profiles of more than 30 intergovernmental organizations and UN agencies.” According to CQ Press it “has been updated to include coverage of current events, issues, crises, and controversies.”

• Landmark Legislation, 1774–2012: Major U.S. Acts and Treaties, (978-1-4522-9228-1, $175) is a second edition that contains “information about the most important laws and treaties enacted by the U.S. Congress — including an additional decade of new legislation since the first edition was published. Detailing more than 1,300 bills that became law, the Second Edition... expands its coverage to include the last five numbered Congresses, which have seen landmark legislation in the areas of health insurance and health care reform, financial regulatory reform, fiscal stimulus ...”

SAGE Reference has just released two new multivolume sets.

• Encyclopedia of Humor Studies (978-1-4129-9909-0, $350) is a two-volume set edited by Salvatore Attardo that “explores the concept of humor in history and modern society in the United States and internationally. This work’s scope encompasses the humor of children, adults, and even nonhuman primates throughout the ages, from crude jokes and simple slapstick to sophisticated word play and ironic parody and satire. As an academic social history, it includes the perspectives of a wide range of disciplines, including sociology, child development, social psychology...”

• Encyclopedia of Deception (978-1-4522-5877-5, $350) is another two-volume set. Edited by Timothy R. Levine, this work "examines lying from multiple perspectives..."
drawn from the disciplines of social psychology, sociology, history, business, political science, cultural anthropology, moral philosophy, theology, law, family studies, … and more. From the “little white lie,” to lying on a resume, to the grandiose lies of presidents, this two-volume reference explores the phenomenon of lying in a multidisciplinary context to elucidate this common aspect of our daily lives.”

ABC-CLIO is also publishing a couple of new sets in April.

- Famous Assassinations in World History: An Encyclopedia (978-1-61069-285-4, $189) is edited by Michael Newton and provides “complete and up-to-date coverage of assassinations of key figures throughout history and around the world… Each entry identifies the assassination target and summarizes that person’s significance; discusses the person’s assassination, including the factors that led up to it and its political and cultural contexts; and explains the powerful effects of the assassination in world history… In addition, 23 primary source documents provide accounts of assassinations throughout world history.”

- Muhammad in History, Thought, and Culture: An Encyclopedia of the Prophet of God (978-1-61069-177-2, $189) Editors Coeli Fitzpatrick and Adam Hani Walker, offer readers “more than 200 A–Z entries” that “summarize views of Muhammad from the earliest editors of the Qur’an to contemporary Muslim theologians” and “explores the traditions, ceremonies, and beliefs of Islam as they have spread worldwide, and examines Muhammad’s role in other religious traditions as well as the secular world.”

IGI Global has recently added one new title to their reference list.

- Encyclopedia of Business Analytics and Optimization (9781466652026, $2560) is a five-volume set edited by John Wang that looks at the “challenges of information retrieval in the age of Big Data by exploring recent advances in the areas of knowledge management, data visualization, interdisciplinary communication, and others. Through its critical approach and practical application, this book is … for the professional, leader, analyst, or manager interested in making the most of the knowledge resources at their disposal.”

Wiley has also added a new reference to their list.

- The Wiley-Blackwell Encyclopedia of Health, Illness, Behavior and Society (978-1-4443-3076-2, $795) is co-edited by William C. Cockerham, Robert Dingwall, and Stella Quah and provides a “comprehensive, interdisciplinary, and international reference work on all aspects of the social scientific study of health and illness…”

In case you missed it, January saw Oxford University Press add a number of new titles to their online Oxford Quick Reference collections.

- A Dictionary of Genetics (8 ed.)
- The Concise Oxford Dictionary of the Christian Church (3 ed.)
- A Dictionary of Food and Nutrition (4 ed.)
- A Dictionary of Epidemiology (5 ed.)
- A Supplementary Dictionary of Sports Personalities (1 ed.)

Oxford also added one title to its online Oxford Reference Library.

- The Oxford Encyclopedia of Biblical Interpretation (1 ed.)

You can find more information along with relevant links at: http://www.oxfordreference.com/page/new/whats-new.

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Rumors
Marketing Program at Harvard University (1992). Read all about her in Forbes, BusinessWeek, etc.


We will also have a keynote from John Rennie. John received a Bachelor of Science in Biology from Yale University and worked as a science writer and researcher at Harvard Medical School. He currently teaches science writing as adjunct professor at New York University’s Arthur L. Carter Journalism Institute, and writes his The Gleaming Retort on the PLOS Blogs Network. John served as editor in chief of Scientific American between 1994 and 2009. Based in New York, he continues to work as a science writer and editor, and as an adjunct instructor in New York University’s Science, Health and Environmental Reporting Program.

http://blogs.plos.org/retort/about/
http://www.weather.com/tv/tvshows/hacking-the-planet/cast

We will have another debate this year between Rick Anderson (University of Utah) and David Magier (Princeton). This year’s
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ATG Interviews Neil Blair Christensen

Digital Business Development Director, University of California Press

by Tom Gilson  (Associate Editor, Against the Grain)  <gilson@cofc.edu>

and Katina Strauch  (Editor, Against the Grain)  <kstrauch@comcast.net>

ATG: Neil, can you give us a little information about your background?

NBC: I’m Danish-Jamaican, born in a small isolated Greenlandic settlement. We later moved to Denmark and I did my MA in Arctic studies with a focus on online anthropology. My work over the past 13 years includes roles in Europe, Asia, and the USA with Munksgaard, Blackwell, Nature Publishing Group, and Wiley. During this period, I worked in a range of areas, from digital business development, partnerships, health sciences, and journals to workflow solutions.

ATG: What caused you to change your career path from anthropology and Arctic studies to publishing?

NBC: Back in the day, there was little funding available for my proposed research in networked education in the arctic. Once in publishing I was hooked.

ATG: What attracted you to join University of California Press as Digital Business Development Director?

NBC: Mission, meaning, and great ideas. In my mind, UC Press is extraordinarily well positioned to craft a digital “do-no-evil” ethos around community, transparency, knowledge curation, and crediting. As part of the University of California, we belong to one of the greatest knowledge networks in the world and are located in a region with unrivalled digital expertise. If there were ever a time and a place to join a university press with a knowledge-based and non-profit digital mission, this would be it. So here I am.

ATG: What do you mean by a digital “do no evil” ethos? Why is that important to you?

NBC: I mean publishing that supports rather than exploits the academy. It is important because advancing the academy is core to our mission.

ATG: This is a new position for UC Press. What do you see as your first priority(ies) or objective(s) in this new role?

NBC: First priorities are to listen, digest, and ask questions of the team internally and our strong external network of partners, including authors and librarians. My colleagues have done amazing work in setting a strategic direction, and much of my initial work now is to tease out, test, and build digital product concepts that speak to the strategy.

ATG: Can you tell us what that “strategic direction” is? Broadly speaking, what type of digital products fit that strategy?

NBC: Very broadly speaking, products that build and leverage our UC network, are extensible, and generate new revenues.

ATG: In a world where exclusive reliance on print is shifting, particularly in scholarly markets, how do you think UC Press can balance the needs of print publishing alongside the development of digital products?

NBC: Requirements are as complex as ever and require parallel business models that can change with technology adoption and publishing business models. We are addressing some of the complexities through an on-going strategic review of our product mix, and building efficiency in our traditional publishing business. Similar to other publishers, we eventually will change to a digital first model, that doesn’t mean that print books will disappear just yet. It simply means that a printed product becomes a version of our digital content, and not the other way around. We pay attention to the needs of the academy, and UC Press can benefit enormously from engaging its mission-driven relationships within the University of California network to understand and build need-driven solutions.

ATG: What do you think will set UC Press apart from other UPs and traditional publishers in moving towards digital products? And why?

NBC: The very nature of some of the initiatives we are planning will set us apart. We are...
Interview — Neil Christensen
from page 50

poised to launch initiatives that are a real break with a traditional university press approach, while keeping us grounded in research, education, and the commitment to ground-breaking scholarship for which UC Press is known. It may seem a truism, but there’s generally a need for slightly less repetitive talk and more doing amongst traditional and university press publishers. Strategy is great but you need products and customers to learn. Ultimately, our actions and the reception of our digital initiatives will set us apart from other publishers.

ATG: That sounds intriguing. In what ways will your initiatives break with the traditional university press approach?

NBC: I can’t go into detail at this stage, but the way I see it, as we develop new products we should think more of ourselves as a 100-people start-up with existing annual revenues of +$22m, affiliated with one of the world’s greatest knowledge networks, situated down the road from Silicon Valley, and in search of networked business models that advance science and education. There are start-ups with worse odds that achieve great things, and there are larger publishers that are stuck in their own mud.

ATG: Your background is very much from the perspective of a commercial publisher. How do you think the digital expertise and perspective you have gained can be utilized in the university press environment?

NBC: It helps if you have a good understanding of your commercial competitors and which buttons to push as you set out to change how publishing facilitates the academy in its mission. Our role is not to replicate commercial publishers, but rather to differentiate and serve the academy better. We will use digital technologies and partnerships to scale efficiencies and act in an agile framework. Technologies and processing power that would have been prohibitively expensive for a non-profit organization such as ours are now well within reach. The beauty of new digital technologies is that you are possibly better positioned to take timely advantage of them if you are not a large commercial publisher. We are lighter and can cover greater distances in shorter time, in some instances possibly in collaboration with local Silicon Valley partners.

ATG: In an interview with Alison Mudditt in the December 2011 issue of Against the Grain, she discussed two potential pilot “born digital” products. What initiatives is UC Press working on that you can tell us about now?

NBC: We are working on a broad-scale OA initiative. Though many have dabbled with smaller scale initiatives, to this point, university presses haven’t jumped into the deep end with OA. UC Press is exceptionally well placed to play a leading role in OA with the model we have in mind, and the model is unlike anything available. The first stage will look at OA articles, and the second stage will look at OA books. Other areas we’re exploring include location sensitive workflow apps to better integrate learning resources in the classroom setting. These projects are in their formative stages, so I can’t tell you more about them now, but they align in their potential to scale, and in this you will find our digital focus.

ATG: Can you talk a little more about the model you have in mind? How will your OA initiative make economic sense for UC Press?

ATG: What models will you use to ensure enough of an income stream to support your open access efforts for journal publications? And what about books and eBooks?

NBC: Unfortunately, we’re simply not yet ready to discuss in detail at this stage. You know, publishers argue endlessly over OA, but the only voices that really matter in the end are the choices of our customers. Our role is not to produce models that work for other publishers. Our role is to create models that work particularly well for our customers in the academy and for the press.
ATG: Knowledge Unlatched is not your first pioneering effort. Early in your career you founded Pinter Publishers, believed to be the first British publishing company owned by a woman. Can you tell us about that? Your career has been marked by a number of other publishing achievements. Of which are you most proud?

FP: Founding Pinter Publishers at the age of 23 was an accident. I was an American living in London, finishing off a PhD and wondering what to do with my life. I knew I wanted to stay in London but was also aware that I was unlikely to get a work permit. At the same time I ran into the young Mahmood Mamdani (now an eminent professor at Columbia) and encouraged him to write a book on his experiences of being a Ugandan Asian thrown out of his home country by the dictator Idi Amin. I had the crazy idea that if I set up a publishing company I’d get a work permit and at the same time help Mamdani by publishing his book. Everything then fell into place.

In the middle of my publishing career I was given the opportunity to work for George Soros. My brief was to do whatever it took to help develop the new independent publishing sector in the 30 countries of the former communist block shortly after the fall of the Berlin Wall. We focused on the higher education requirements and in those heady days of the nineties helped transform availability of good books. I’m very proud of having played a role in that transformative period.

ATG: Knowledge Unlatched has been described as a “Global Library Consortium” model for supporting Open Access books. What does that mean? When asked by librarians and publishers unfamiliar with the project, how do you explain Knowledge Unlatched?

FP: It took a long time to come up with a succinct answer to this question. It’s best described in our recently produced animated infographic http://www.knowledgeunlatched.org/ku-in-60-seconds/. We describe it as a cost-sharing model. By covering the upfront fixed costs that are incurred in getting a raw manuscript to first digital copies, libraries are working with publishers to enable books to go open access in a sustainable manner. The funding comes from the acquisitions budgets but when stretched the budgets go further because of the lower costs per book per library.

ATG: We understand that you first unveiled your vision for the “Global Library Consortium” approach at the Charleston Conference in 2010. What factors contributed to you forming that vision? How did the vision evolve and become Knowledge Unlatched? Did anything gleaned from the 2010 Charleston Conference contribute to that evolution?

FP: It’s hard to believe that it was such a long time ago that I first came to Charleston. The idea was, as you say, described as a “Global Library Consortium.” I didn’t even have a name for it back then. Meeting librarians in the lovely setting of Charleston gave me an opportunity to understand their concerns. At that point PDA was considered by some to be the solution to library budget problems. I understood then that the cost of supporting open access would have to be justifiable in terms of price and not just because it was a good thing to do. The questions asked at that plenary session helped me shape this initiative to sit alongside others. I really believe that there is no one solution to getting to OA. There will be many routes to OA operating alongside one another. KU is one route; single institutional support for authors will be another. Funds out of research budgets similar to APCs (call them Book Processing Charges – BPCs) will be another.

But the vision came earlier in 2006 when I met Larry Lessig and thought there must be a way of utilising Creative Commons’ licenses in a way that enables open to sit alongside other formats.

ATG: How did you get your start-up funding? Do you have any sponsors or investors?

FP: The first supporters were three Australian universities, Queensland University of Technology, University of Melbourne, and the University of Western Australia. I received a grant from the Open Society Foundation, who has been very active in the Open Access movement. A further grant was kindly provided by the British Library Trust. Office space was made available free of charge at the Big Innovation Centre in London.

ATG: What criteria did you use when selecting publishers for inclusion in KU? What standards for scholarship and overall quality did they have to meet?

FP: The main Board has the legal responsibilities of running the Community Interest Company. A C.I.C. is a form similar to a 501c3. It was introduced just under ten years ago into the British legal system as a way of encouraging social entrepreneurship. The board began with no librarians or publishers. Instead the board was made up of people with legal, financial, and marketing skills. Recently Tom Cochrane, once a librarian but recently former Vice Chancellor at QUT, was invited to sit on the board in recognition of the early support from Australia (and because he’s a great thinker on OA issues). The Advisory Board is made up of experts and influencers representing the stakeholders in this area.

ATG: So far 13 publishers are participating and there are 28 new books that are part of the collection. What were your most effective arguments in convincing publishers to take part? What type of resistance did you encounter? What are publishers’ biggest concerns about Knowledge Unlatched?

FP: The most effective argument to participate is that sales of monographs are dwindling.

Yet, the academic community does not want to see this long-form publication die. Neither publishers nor librarians could square this circle alone. So something needed to be done that made better use of the funds available and the OA route actually squeezes out costs and reduces risks associated with this kind of publishing.

Resistance came in two forms: ideological and practical. The first line of argument was that books are not made for free so why should they be free? This was easy to deal with because no one is suggesting that the publisher’s input should not be recompensed. It’s just that payment is made in a different way.

The second argument was around workflows. How disruptive would KU be? Well, the devil is in the detail and we tried to design workflows that bolt on to what exists and not make too many demands on publishers (or indeed librarians). A few new steps have had to be introduced but it is incumbent on us to show that the benefits outweigh the effort to make a few adaptations to processes.

Publishers were mostly worried about OA versions “cannibalising” their sales. This fear is diminishing slowly as evidence is beginning to show that great books sell better and lousy books sell less well. People still want print and other digital versions.

ATG: What are you most proud? Of which are you most proud?

FP: The first British publishing company owned by a woman.

ATG: What are your most proud? Of which are you most proud?

FP: The first pioneering effort. Early in your career you founded Pinter Publishers, believed to be the first British publishing company owned by a woman.
FP: We asked librarians what kinds of publishers they wanted to see in the group. We insisted that books be peer reviewed. Then we wanted to see a broad representation of university and commercial presses, large and small presses, and a geographic spread including North America, UK, and Continental Europe. In future we’ll be broadening the range, but insisting on top quality control.

ATG: Can you download KU books onto your personal computer or mobile device? Are there any plans to offer print-on-demand?

FP: Yes, you can download the books on your computer or mobile device. Print copies are available through the normal channels from publishers.

ATG: Once the books are ordered and “unlatched,” how are they delivered to the library for patron use? Does Knowledge Unlatched have its own platform? Are they delivered via the publisher’s platform?

FP: The books will be hosted in three locations. HathiTrust, OAPEN, and the British Library. Larger publishers may choose to host the books on their own platforms, though smaller ones won’t have platforms themselves. Knowledge Unlatched does not have a platform. More information about the status of any individual book can be found on our site. While some books were newly available in March when we were able to announce the unlatching, a few were not yet published and information about these is updated regularly.

ATG: Evidently you worked with LYRASIS, JISC Collections, and the Max Planck Society to facilitate library sign up. Can you describe that process? What other strategies did you employ to get library buy-in? What role did pricing play?

FP: Our relationship with each of these bodies was different. LYRASIS was the sales agent for North America. And we benefited greatly from Tom Sanville’s advice. Lorraine Estelle of JISC Collections made it possible to advertise the collection through their channels and provided billing services for the UK. Ralf Schimmer of the Max Planck Society kindly held a one-day workshop for key librarians in Germany to worship through the model with me.

Social Media played an important role in promoting the Pilot Collection, too. I spent a lot of time at conferences presenting the concept. In the end there was one main message. Libraries can do good by supporting open without it costing them any more than it would do staying closed and buying books unit by unit, whether print or digital.

The average cover price for the hardback of each of the books in the collection is $95. Of course, some are available at less in paperback, and libraries receive discounts via vendors and aggregators. Once we knew that the average Title Fee per book was $12,000, we thought the price of $60 per book would be acceptable and then we thought we could rally 200 libraries to join up. In the end 296 libraries came on board, bringing the average price per book per library down to just under $43. I’m hoping that in the future more libraries will join thus bringing the cost down even further for future books for each and every library.

ATG: As we understand it, the Pilot Collection is being purchased in its entirety by these libraries. Correct? Is there any way to purchase individual titles?

FP: For the pilot collection we chose to offer it as a single collection that included a number of subject areas rather than on a single title basis simply because the task of selecting and tracking was more complex than we wanted for the pilot. Going forward we intend to offer smaller subject-based collections, and thereafter hopefully title by title.

ATG: The first phase of the project has ended and sign-up for the KU Pilot Collection has now closed. If you were rating it like you would rate a book on Amazon, how many stars would you give it? Why?

FP: It really is not for me to rate the project. It would be like an author writing a review of their book, wouldn’t it? I’m profoundly grateful to the libraries and publishers who took a risk with this new concept. There are small areas of execution that need improvement and we’re working on them. Everyone is being very patient as we iron out a few bugs.

ATG: From what you have learned so far from Knowledge Unlatched what would you say are the key elements in a financially sustainable open access model for offering large numbers of scholarly monographs? Do you think they are attainable on an industry-wide scale? If so why?

FP: At the end of the day the academic community will decide whether monographs are worth having. I believe they will continue to need the long form publication for complex arguments, theories, and discussion of research. As I said earlier, I doubt that there will be one route to open access. However, we need to be clear who pays for the work that needs to be done to get the content out of the author’s head, turn it into a readable form, and make it available to readers anywhere in the world. With a handful of transparent models and much clearer understanding of costs than we have now we can move away from selling books unit by unit which incurs so many unnecessary costs. Monographs generally do not make large amounts of profit for anyone. If the publishing process is streamlined on the one hand, and we can show that by making the content open there is greater readership, then sustainability can be attained.

With regard to the latter point, metrics on usage of open books are only just coming in from other projects. As you know, I am also the CEO of Manchester University Press. There my predecessor placed 80 titles on the OAPEN platform three years ago. These were mainly backlist titles that had already recovered their investment. In the first two years the average download per book per month was 69 copies. Far more usage than any of the few hundred copies sold in print to libraries. But what was even more astonishing was that in the third year the average number of downloads per month per book was 138. The OA version was hitting markets we hadn’t reached and interest was growing not declining. I really believe that with closed books, print or digital, we are only skimming
the project expand and include science publishers and books?

**FP:** We are only just now formulating the plans for how we can work with more publishers and deliver more books. A report on what we’ve learnt through the pilot will be ready in May by which time we’ll have established a Library Steering Committee and will be working on setting up the Library Collections Committee. I began this project with Humanities and Social Sciences because their monographs were in the most trouble. But there would be no reason not to include Science books. Ultimately KU is a channel and by working together publishers and librarians will decide what to use it for.

**ATG:** We’ve also been told that there is even a phase three in the offing. What will that involve?

**FP:** I’ve always seen KU in three phases. Just like any other initiative we have to find our route to sustainability. The first was the Pilot — now competed. The second is scaling up. This not only means having more books, it means having the right systems in place — most likely through a variety of partnerships. There doesn’t seem to be much point in reinventing the wheel when others have very nice ones running along. We’ll be introducing a small handling charge and membership fees so that we’ll be independent of grants. Phase three is when we have enough volume to fund the KU infrastructure through the mark up of the Title Fees. We’ve said that this would be in the region of 5%.

**ATG:** It must be exciting to be spearheading such an innovative project but it also demands a lot of energy. What do you do in your downtime to relax and refresh? Do you have favorite activities or interests outside of publishing and libraries?

**FP:** I love my work, so there is not much downtime. But I do enjoy the usual things — reading novels, going to concerts, taking a walk in the park with my husband.

**ATG:** Frances, thank you. We’re very grateful for your willingness to tell us about Knowledge Unlatched and appreciate your open and thoughtful answers.

**FP:** Thank you for the opportunity.

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**International Dateline — A Good Bookman**

by Rita Ricketts (Blackwell’s Historian and Bodleian Visiting Scholar, Author *Adventurers All, Tales of Blackwellians, of Books, Bookmen and Reading and Writing Folk*) <Rita.Ricketts@bodleian.ox.ac.uk>

“The librarian’s, I should say, is the happiest lot, though some may think it lacks the excitement, which risk and enterprise provide. If he is a College or University Librarian, he is perhaps happiest of all, should the bent of his mind be studious.” — Basil Blackwell

The good bookman, Sir Basil, wrote this in 1945, so we have to forgive his gender specificity. He believes in the spiritual value of books. He believes with Wordsworth that books “are a substantial world both pure and good; Round these, with tendrils strong as flesh and blood, Our pastime and our happiness will grow”; with Carlyle that “In books lies the souls of the whole past time the articulate and audible voice of the Past”; and with Milton that “A good book is the precious life-blood of a master-spirit, embalmed and treasured up on purpose to a life beyond life.” For Sir Basil, publisher, bookseller, and would-be author, it was “the reader who really counted.” He quotes Emerson, who once said, “The good reader that makes the good book.” Who, then, was the good reader, Sir Basil asked himself? One who reads with zest and intelligence, enjoying by understanding, who attends to the views of critics but judges for him- or herself. One who remembers the fable of the Emperor’s clothes, is wary of false prophets, is quick to detect insincerity in an author and to reject one whose motive is unworthy. One who recommends convincingly a good book, and knows when he or she has found one and then commends it to the next generation … telling the good news of the discovery. Richard Ovenden has spent his life doing just that.

But Richard has done much more besides. Like the Bodleian’s founder, Sir Thomas Bodley, he is engaged in library building. Working in the second row to support his predecessors Reg Carr and then Sarah Thomas, he has orchestrated the reconstruction of Gilbert Scott’s so-called “New” Bodleian; to be renamed the Weston Library. Its entrance, to be named the Blackwell Hall in honour of Julian Blackwell’s gift, will be open to all and will, appropriately, provide the setting for future exhibitions and events that celebrate the book. It was Julian Blackwell’s donation of £5m, the largest single cash donation ever made to a university library in the UK, which has been central in helping Richard to put his plan into action. Julian had been in on the scheme from the start, conspiring with Richard and Reg Carr and then Sarah Thomas in the bar of a local hostelry. The Hall cements the bond between the library and the world famous bookish neighbour whose current president, Julian Blackwell, is the great grandson of Benjamin Harris Blackwell, who came to Oxford in the 1830s to save souls from the demon drink and to nourish them with books. He became the first librarian of Oxford’s newly founded City Library in 1854. The son of a jobbing tailor from London’s East End, he was an autodidact worthy of that honorable tradition. He lies in a shady grave aside the old church of St. Cross, in Oxford, now itself a library. If tombstones had ears, he would be enlivened by the news of Richard’s appointment.

More fortunate that the self-educated Benjamin Harris and his son Benjamin Henry, who founded the world famous Broad Street Shop, Richard won a scholarship to Sir Roger... continued on page 55
Manwood's Grammar School in Sandwich, Kent. Founded in 1563, it remains a free grammar school with selection by examination. But Richard is a passionate advocate and supporter of the autonomous, as his book on the photogenicism of John Thomson bears testament to. His interest in books started in the late 1960s when a dusty old second-hand bookshop in the Kentish port of Deal had more pull than flower power, school cricket, or the fun-fares and arcades of neighbouring seascapes. Here he adventured in the mind, in thrall to Kent's Roman and then Viking invaders, its medieval pirates, perennial smugglers, and tales of fisherfolk struggling to make a living. Hastings was nearby, where the Normans prevailed over Harold in 1066, and Canterbury, where pilgrims wended their way to the shrine of Thomas Becket. Richard's own pilgrimage led him on to a treasure hunt in the world of books. He was the very personification of the good booksman as described by Basil Blackwell, himself educated at a local grammar school (Magdalen College School) in Oxford.

From Deal, Richard progressed to Durham University and University College London and he turned, not surprisingly, to librarianship. Starting at the Durham University Library, his career took him to the House of Lords Library, the National Library of Scotland (as Deputy Head of the Rare Books Section), the University of Edinburgh (as Director of Collections), and since 2003 at the Bodleian Libraries; first as Keeper of Special Collections and, since 2011, as Deputy Librarian. He sits on the Panel of the National Heritage Memorial Fund, is a Trustee of the Kraszna Kraus Foundation and of the Victoria County History for Oxfordshire, serves on the Council of the Bibliographical Society, is currently Chair of the Digital Preservation Coalition, and heads Oxford’s involvement with the Google mass digitization project. His scholarly interests, in the future of the information world, in book and photographic history, ensure him a welcome as a fellow of Balliol; he holds a profession fellowship at St. Hugh's. Even in the age of the Kindle and iPad, and given his enthusiasm for digitalization with all that this means for the democratization and dissemination of knowledge, Richard believes in the power of the book itself. It has a history going back way beyond the invention of printing and a cultural legacy of four thousand years. The great Bodleian Library is a storehouse of this heritage. And its twenty-fifth librarian wants to ensure that it is enjoyed by all: way beyond the confines of Oxford.

To determine the share of the Bodleian's treasures, Richard divined an opportunity to write a new chapter in its history. This metamorphosed into the Weston Library Project, which would transform the old New Bodleian. Sir Giles Gilbert Scott's Library, completed in 1940, had been judged innovative in its time and he was recognised as a great architect at the peak of his powers. The grandson of Sir George Gilbert Scott, he is famous for such buildings as Liverpool Cathedral and Battersea Power Station, and for being the creator of the red telephone box, perhaps the ultimate British design icon. Some of his other buildings in Oxford, like the grade-II listed Hartland House at St. Anne’s College, are still widely admired. St. Anne's is going to great pains, with its current £10m development proposals, to make its own Gilbert Scott building more visible. Gilbert Scott's Library, also a grade-II, was a daunting one. He had to provide a vast bookstore on a limited site in a building that for aesthetic reasons had to be kept low enough to conform with the general height of neighbouring buildings. The answer was to go underground, with four of the floors, which would house 60 percent of the bookstacks below ground level. Given that the water table sits close to street level for much of the year, it effectively meant that the books were lying, literally, in a lake. This uncomfortable truth dawned on the National Archives, who questioned the future of the Bodleian as an approved repository for housing archival collections of national significance.

The unprotected columns which formed the building’s skeleton presented a fire risk that would be totally unacceptable in any modern library, never mind one that happens to store a Gutenberg Bible, the earliest surviving book written wholly in English, two Shakespeare first folios, the original manuscript of Frankenstein, the papers of six British Prime Ministers, and more than 10,000 medieval manuscripts. Renovating the Bodleian created an opportunity to make it an integral part of the environment of Broad Street and transform the old fortress into a fairway for visitors from all walks of life and climes. But it was not just an egalitarian dream, it was a necessity and it was to cost over £78m, which by hook and by crook was found. Wilkinson Eyre Associates, architects, stunning design respects the building’s heritage while modernising the infrastructure: replacing the central stack, the development of three floors of secure storage below ground level, the provision of additional reading rooms, and the creation of dedicated spaces for curation and conservation. The new glass frontage facing out to Broad Street will entice the public to come in from the street; it was not open to them in the past. “People will even be able to see books from the street,” said Sarah Thomas, Richard's predecessor. Shafts of light will illuminate the new exhibition galleries and learning spaces, and the atrium, which will provide a place to meet over coffee, leads off into rooms with both permanent and temporary exhibitions.

Bodleian exhibitions already attract about 100,000 visitors a year; the new exhibition rooms will bring more opportunities for more people. But crucially, the Weston Library will serve an ever-widening commonwealth of scholars, providing them with better facilities while reaching out to the local community and the next generation still at school. It is a model of egalitarianism and a gateway to treasures as yet rarely seen. But Richard’s remit, as head of the Bodleian Libraries, is far wider. He is at the helm of a national and international cultural and scientific institution, engaging in collaborative projects worldwide while ensuring that his staff has the requisite skill set. His task is enormous. As higher education becomes increasingly global, connected by digital mediums, devising ways to meet the demands of users will challenge even someone as stalwart as Richard. Yet the Bodleian Libraries are under-resourced and Richard is hard on the heels of possible donors. He spares no effort as he travels the world, and he has a host of entrepreneurial solutions up his sleeve, such as licensing, publishing, and retail. “As we move further into our fifth century as a library, our challenges can be summed up in one sentence: matching the legacy of the past with the promise of the future.” And the future is bright with Richard’s plan to open the Bodleian’s treasure trove to the world.

The first exhibition planned after the Weston Library’s public opening on 21 March 2015 is Marks of Genius, which will feature some of its prized gems. A preview of this exhibition, made possible by the generosity of Julian Blackwell, will be on show at the Morgan Library on Madison Avenue in New York. It will feature approximately sixty rare and exceptional objects from diverse disciplines that serve as points of departure for exploring some of the fundamental meanings of genius. The ways in which genius has been cultivated, recognized, and venerated will be explored through such works as early manuscripts of Euclid’s Elements and Gregory I’s Regular Pastoralis, the oldest book written in English; an Arabic manuscript book of constellations; a unique papyri of Sappho’s poems; the copyright deposit copy of Shakespeare’s First Folio; a thirteenth-century manuscript of the Magna Carta; the definitive account of Aztec civilization; the manuscript of Handel’s Messiah; J. R. R. Tolkien’s drawings for The Hobbit; and Mary Shelley’s manuscript draft of Frankenstein.

Bodley’s new librarian has struck gold, and he will be registering his mental thanks with the unknown bookseller who first inspired him in Deal. But the Libraries of Oxford have struck a more than good deal. Richard has already proved to be a living treasure and his ability to juggle many portfolios, not least the delivery of the Weston Library, has the hallmark of genius.
The general topic for my contribution to the “Long Arm of the Law” program at the 2013 Charleston Conference was the continuation of two ongoing epic sagas in the world of digital books: the Apple eBooks price-fixing conspiracy and the Google Books copyright litigation. Charleston Conference attendees will perhaps remember my earlier accounts of episodes in these sagas: “Of Books and Competition” in 2010; “Apples and Books or A Gaggle of Googles” in 2011; and “iPad That” in 2012. Since the 2012 Charleston Conference much has happened in the Apple and Google cases. Let’s start with the trial and judgment in United States v. Apple.

U.S. v. Apple, Inc.

As you may recall, in April 2012, the United States Department of Justice filed a civil suit against Apple and five of the six largest U.S. publishers alleging violations of the Sherman Antitrust Act arising from an alleged conspiracy to fix the price of eBooks. On the same day, the DOJ announced an already-negotiated settlement of the case against Hachette, HarperCollins, and Simon & Schuster. Not long thereafter, the attorneys general of 33 states filed their own cases against the defendants, which were joined with the DOJ’s suit for pretrial proceedings.

How did this happen? It all started with the explosive success of Amazon’s Kindle eReader. As more and more publishers started offering eBooks in 2009, Amazon sought to dominate the business with a low-price marketing strategy: Amazon would retail all eBook bestsellers at $9.99 for use on its Kindle eReader (even if the print version sold for a lot more). Publishers were not happy about this pricing point, and neither was Apple which had plans to include an eBook program on its iPad. A chart of telephone calls between the CEOs of Apple and the publishers shared their progress with one another. (The court’s written opinion includes a chart of telephone calls between the CEOs of the publishing houses.)

The court concluded that the conspiracy significantly harmed consumers. Since “the laws of supply and demand were not suspended for eBooks,” when the publishers increased the prices of their eBooks, they sold fewer books. Opinion at 97. Thus, consumers suffered in a variety of ways from this scheme to eliminate retail price competition and to raise eBook prices: some consumers had to pay more for eBooks; others bought a cheaper eBook rather than the one they preferred to purchase; and still others deferred a purchase altogether rather than pay the higher price. Id. at 98.

Analyzing the trial record, Judge Cote found that there was “compelling evidence” that Apple “conspired[d] with the Publisher Defendants to eliminate retail price competition and to raise eBook prices” and “overwhelming evidence that the Publisher Defendants joined with each other in a horizontal price-fixing conspiracy.” Opinion at 113. Apple was “a knowing and active member of that conspiracy … not only willingly joining the conspiracy, but also forcefully facilitating it.” Id.

In short, “[t]he totality of the evidence leads inescapably to the finding that Apple chose to join forces with the Publisher Defendants to raise eBook prices and equipped them with the means to do so.” Opinion, at 134-35. Judge Cote even quoted Apple founder Steve Jobs’ own words against his company, pointing out that, on the day of the launch of the iPad, Jobs told a reporter that “Amazon’s $9.99 price for [a book newly offered on iPad for $14.99] would be irrelevant because soon all prices will ‘be the same.’” Id. at 149.

The court subsequently had proceedings to determine what remedy to impose on Apple. On September 5, 2013, Judge Cote entered a Final Judgment and injunction against Apple. The court’s order requires Apple to modify its existing agreements with the five major publishers with which it conspired — Hachette Book Group (USA), HarperCollins Publishers L.L.C., Holtzbrinck Publishers LLC, which does business as Macmillan, Penguin Group (USA) Inc., and Simon & Schuster — to eliminate any risk that Apple would ever have to compete on price when selling eBooks, while as a practical matter forcing the Publishers to adopt the agency model across the board.” Opinion at 48. The MFN clause “literally stiffened the spines of the Publisher Defendants to ensure that they would demand new terms from Amazon.” Id. at 56. And during their negotiations with Amazon, the
In October, Judge Cote appointed Michael Bromwich as the external monitor of Apple. The 60-year-old Bromwich is an experienced criminal prosecutor and investigator, sort of a “go to” guy for difficult, high-profile assignments. He helped investigate the bombing of Pan Am Flight 103, probed the FBI’s conduct in the Aldrich Ames spy case, and took over the regulation of offshore drilling after the BP - Deepwater Horizon oil spill. Earlier in his career, he worked on the prosecution of Col. Oliver North. To counterbalance Bromwich’s lack of experience in antitrust matters, he will be assisted by Bernard Nigro, the chair of the antitrust department at the NY law firm, Fried Frank.

Apple, Inc. continues to maintain its innocence and has recently filed an appeal of Judge Cote’s orders to the U.S. Court of Appeals for the Second Circuit in New York City. The appeal will probably take a year or more to work its way through the system, but it is not likely that the district court’s order will be overturned. The liability finding is based on well-recognized principles of horizontal conspiracy theory and reasonably grounded in the evidence, and the remedy order seems carefully and narrowly drawn to address Apple’s specific type of misconduct, without over-reaching into other areas of Apple’s business (as the government had wanted).

A more interesting question is whether the enforcement action against Apple and the publishers will meaningfully benefit either consumers or libraries. For consumers, the prices of bestsellers in eBook format appear to have stabilized at levels lower than those prevailing during the time of the conspiracy, but are about 15-20% higher than Amazon’s $9.99 price point in 2009. For example, John Grisham’s Sycamore Row sells for $11.99, regardless of whether you order it as a NOOK Book, Kindle edition, or from the Apple iBookstore. And there are potential damage claims to be paid by Apple and the publishers: the five publishers have already settled the states’ claims against them for $166 Million in damages. (Their settlement with the DOJ involved only injunctive relief.) Judge Cote has scheduled a trial of Apple for May 2014 to determine the damages that it will have to pay the states and private plaintiffs as a result of its eBook price-fixing. The amount of overcharges — which would be trebled under the antitrust laws — could total hundreds of millions of dollars in damages.

For libraries, the question of whether the Apple case has been or will be of any benefit is more complex. As some of the programs offered at the 2013 Charleston Conference illustrated, publishers have made life difficult for libraries that wish to make eBooks available to patrons or researchers. Some publishers refuse to publish a lendable eBook version of their titles, and those that do offer a lendable one impose high license fees (you can’t “buy” the book) and also various restrictions on circulation. If you buy Sycamore Row for
your personal Nook or Kindle, it will cost you $11.99, but if you want a lendable version for the public library, you will probably pay eight times that amount (assuming that Doubleday will lease you one).

Why do publishers seem so determined to make it hard for libraries to lend eBooks? I bet it has something to do with money, eh? Publishers probably think they will “sell” more eBooks to individuals if folks can’t click on their local library’s Website and download a copy of the book for free. Is it legal for publishers to impose high prices and burdensome lending rules on libraries? Probably, unless it turns out that publishers and burdensome lending rules on libraries?

Putting aside the merits of Google’s claim that plaintiffs are not representative of the certified class — an argument which, in our view, may carry some force — we believe that the resolution of Google’s fair use defense in the first instance will necessarily inform our analysis of many class certification issues, including those regarding the commonality of plaintiffs’ injuries, the typicality of their claims, and the predominance of common questions of law or fact. Moreover, we are persuaded that holding the issue of class certification in abeyance until Google’s fair use defense has been resolved will not prejudice the interests of either party during the projected proceedings before the District Court following remand. 721 F.3d at 134.

Thus, the question of whether it is “fair use” to electronically copy millions of copyrighted works has now resumed centerstage in the Google Books case.

Judge Chin wasted little time in moving forward with consideration of the fair use defense. After the parties submitted legal briefs, the court heard oral argument on September 23, 2013. While it is notoriously unreliable to divine which way the case will come out from the give and take of oral argument, at least one court watcher concluded that the judge was definitely leaning towards Google. Judge Chin appeared to find the decision by his fellow judge Harold Baer in the HathiTrust case to be controlling.

In that case, Judge Baer of the U.S. District Court in New York City was faced with the obverse side of the Google Books case. It involves the same copying of millions of books by Google, but the case looked at that conduct from the viewpoint of the libraries that received from Google and, in turn, made available the digitized books to their patrons. The district court granted summary judgment in favor of the libraries in October 2012. See Authors Guild, Inc. v. HathiTrust, 902 F. Supp. 2d 445 (S.D.N.Y. 2012). The court read Second Circuit law to hold that, where the use of the copied work is for scholarship and research, the analysis “tilts[s] in the defendants’ favor.” Moreover, the court viewed the copying as fair use because it was “transformative.” Judge Baer held that:

The use to which the works in the [HathiTrust Digital Library] are put is transformative because the copies serve an entirely different purpose than the original works: the purpose is superior search capabilities rather than actual access to copyrighted material. The search capabilities of the HDL have already given rise to new methods of academic inquiry such as text mining. [Id. at 460.]

Judge Baer therefore dismissed the Authors Guild’s complaint against the libraries.

During oral argument in the Google case, Judge Chin drew attention to Judge Baer’s conclusion that the library copies in the HathiTrust case were fair use and asked counsel for the Authors Guild whether the court was not in fact bound by that ruling. Judge Chin pointed to ways in which Google Books has improved research and enabled new kinds of research, such as data mining. (He noted that his law clerks use Google Books to do citation checks.) He asked whether those uses are not “transformative.” Counsel for the Authors Guild countered by focusing the court’s attention on Google’s motivations, which were commercial, not exploratory. He also pointed out that the Authors Guild has appealed the HathiTrust decision to the Second Circuit.

It is hard to predict whether the appellate court will agree with Judge Baer’s admittedly unprecedented application of the concept of “transformation” in HathiTrust to permit copying of the complete text of millions of books. Judge Chin seemed to take a harder line when he rejected the proposed Google Books settlement in 2011. At that time, he flatly declared: “Google engaged in wholesale, blatant copying, without first obtaining copyright permissions.” 770 F. Supp. at 679. Now he seems to have changed his tune.

It is hard to accept the proposition of Judge Baer (and perhaps of Judge Chin) that the ease of electronic searching of scanned documents is legally “transformative.” Research for centuries has been done by human beings reviewing the text of books and documents, looking for words or ideas. The fact that a computer can perform that search process faster does not, it seems to me, transform the process into something so different as to allow an unauthorized party to ignore the copyrights of the original authors and publishers. Copying millions of books and storing them in a searchable database may indeed be a useful thing for the world, but defending that copying on the ground that it is for the public good strikes me as little more than a “Robin Hood” defense, in which stealing from “rich” authors is justified on the ground that the proceed are being given to “poor” academics. Is that really a “fair” use? [8]

continued on page 59
QUESTION: A university librarian asks whether it is permissible to provide copies of articles to distance education students who received an incomplete course from a previous term, but who now want to complete the course. They are not currently enrolled at the university.

ANSWER: At the request of a user, libraries that meet the Copyright Act’s Section 108(a) requirements are permitted to make single copies of articles for users under Section 108(d), but only one article per journal issue. There is no requirement that the user be enrolled in the institution in order for the library to take advantage of this exception. The library must have no notice that the copy distributed to the user will be used for other than fair use purposes. Further, the library must have provided the required warning to the user.

If the articles come from a licensed database, however, the terms of the license agreement apply. Such licenses typically restrict access and copies to enrolled students, faculty, and staff. Thus, providing copies from the database to a non-enrolled student would likely violate the agreement.

QUESTION: An elementary school teacher asks whether there is a maximum number of students who can view a video in conjunction with an educational unit. May more than one class see the video at the same time?

ANSWER: There is no maximum number of students who may view a video in a class session. Section 110(1) of the Copyright Act permits the performance of an audiovisual work in the course of face-to-face teaching in a nonprofit educational institution. In order to qualify for this exception, the following requirements must be met: (1) students and teachers must be simultaneously present in the same place; (2) no members of the public may be present; (3) the performance must occur in a classroom or other place normally devoted to instruction; (4) the performance must be part of instruction; and (5) the copy of the work that is performed must be a lawfully made copy.

Having more than one class present in the room to see the video is not a problem as long as teachers and students are present. If the performance is for entertainment as opposed to instruction, then a public performance license is required. The Motion Picture Licensing Corporation offers public performance licenses for motion pictures and videos.

QUESTION: An academic library has a license to an online journal, but the publisher embargoes the most recent 18 months of the publication. For articles within that time period, only citations are available. If the library makes interlibrary loan requests for articles for faculty members via ILL within that 18 month period, must it pay copyright fees after the fifth request?

ANSWER: Unfortunately, the answer is no. It appears that the publishers simply acquired access for a single user although the membership for access should have been a clue. Their mistake in what they were acquiring is a shame, but they most likely signed (or clicked on) a license agreement and are actually bound by the actual terms of the agreement. They should contract the publisher and seek the permission they need. It could be that the publisher will grant this permission without charge, and the professors and the institution will have the comfort of knowing they are not violating the contract.

QUESTION: A public librarian asks about a local historian-author who wants to use some very old photographs of the city of Chiefland, Florida, which hang in one of the branch libraries. The photos are quite old.

ANSWER: This question is likely to be asked with increasing frequency as more journals are available electronically and libraries migrate their subscriptions from print to digital access. The Interlibrary Loan Guidelines were developed by the Commission on the New Technological Users of Copyrighted Works (CONU) at the request of Congress in 1978 and were published in the conference report that accompanied the Copyright Act of 1976. They are silent at this issue, but if the subscription was for the printed journal to which the library has a current subscription, requests for missing articles or even embargoed ones beyond the suggestion of five would be treated as a current subscription.

With an online subscription, the publisher likely would say that ILL fees must be paid beyond the suggestion of five for articles published during the 18 month embargo. There is also a strong argument that the library has a current subscription, however. If the license agreement for the journal is silent as to this issue, ILL requests beyond the five can be treated as covered by the current subscription.

QUESTION: A college librarian was asked by two psychology professors about using a purchased Webinar in their classes. The professors purchased a membership in order to obtain access to the Webinar and assumed that they were buying a downloadable Webinar which they could share with their students. What they actually received was access with an account and a password. Since they purchased access, the professors asked whether they may “reformat” the Webinar by downloading it to a DVD to permit showing it to classes since they purchased access.

ANSWER: Unfortunately, the answer is no. It appears that the professors simply acquired access for a single user although the membership for access should have been a clue. Their mistake in what they were acquiring is a shame, but they most likely signed (or clicked on) a license agreement and are actually bound by the actual terms of the contract. Downloading the Webinar to a DVD and showing it to a class would violate the terms of the agreement. They should contract the publisher and seek the permission they need. It could be that the publisher will grant this permission without charge, and the professors and the institution will have the comfort of knowing they are not violating the contract.

Endnotes
1. Bill Hannay is a partner in the Chicago-based law firm, Schiff Hardin LLP, and an Adjunct Professor at IIT/Chicago-Kent College of Law. He is a frequent speaker at the Charleston Conference and the author of nine books on antitrust and trade regulation.
4. For example, in response to member concerns, the Digital Content & Libraries Working Group of the American Library Association has focused on influencing the so-called “Big 6” trade publishers to sell eBooks to libraries on reasonable terms. See eBook Business Models for Public Libraries (August 2012), http://www.americanlibrarymagazine.org/blog/ala-releases-%E2%80%9Ce-book-business-models-public-librarie s-%E2%80%80D.
old, likely pre-1920. Examination of the photographs does not reveal a watermark, photographer’s name, or any other identifier. Individuals depicted are not identifiable. Further, the photos have hung in the library so long that no one seems to know how or whence they came. What are the copyright implications if the library permits such use? Are the works in the public domain? Or should the author be concerned about the copyright issue?

**ANSWER:** In all likelihood, the library does not own the copyright in the photographs but instead owns a copy, perhaps the only copy. Therefore, the historian does not really need permission from the library to reproduce them. If there is any infringement, it is on the part of the historian and not the library. For photographs that are copyrighted, the author needs permission from the copyright owner.

If the photos were taken in the United States before 1923, they are in the public domain. There is certainly a possibility that the photos are no longer protected by copyright. When they were taken, the term of copyright was 28 years but there was also a renewal term. One would have to know for each photograph when it was taken, whether it was published, whether it was registered for copyright, if the copyright was renewed, etc., in order to determine whether the work is now in the public domain. If a photograph was published in the United States before 1923, it is definitely in the public domain. If it was published but never registered, it is now in the public domain. If registered and then renewed, the photograph may still be protected by copyright.

If the photograph has never been published, and the photographer has been deceased for more than 70 years, it is now in the public domain. These photos existed as of 1978, and they likely passed into the public domain at the end of 2002 if that was later than 70 years after the photographer’s death. Otherwise, the term of copyright is life of the author of the unpublished photograph plus 70 years. If the works are in the public domain, there can be no copyright.

All of this is to say that it is complicated! Would I take a chance and go ahead and use the photos if I were the local historian-author? Yes, I would with a disclaimer that the copyright status is somewhat unclear although the photographs appear to be in the public domain.

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**Endnotes**


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Random Ramblings — If Research Is Good, Is More Research Better?

Column Editor: Bob Holley (Professor, Library & Information Science Program, Wayne State University, Detroit, MI 48202; Phone: 248-547-0306; Fax: 313-577-7563) <aa3805@wayne.edu>

If research is good, is more research better? I’m asking this question after attending the debate between Rick Anderson and Jean-Claude Guédon on scholarly communication during the 2013 Charleston Conference. Anderson was countering the point from Guédon that spending $2,000 from grant funding was an effective way to provide open access. To him, this meant that $2,000 less research would be produced. The assumption behind this assertion was that more research was good, but this assumption isn’t self-evident even if we accept the proposition that research is good. What follows are my thoughts, however naïve, on this topic.

I’m not an expert in science (science, technology, engineering, and medicine) so that the first thing I did was ask the Wayne State University Library System science librarian and former student of mine, Jim Van Loon, to see if he could help me discover any published discussion of marginal return on research investment. He volunteered to look for me and found that, while there is significant interest in measuring research output, return on investment (ROI) in research funding has not been widely studied. This result didn’t entirely surprise me since I would expect researchers to avoid questions like this one. In the wrong hands, any answer that too much research could be counterproductive would be a dangerous weapon to cut funding.

If I were to use logic to answer this question, the law of diminishing returns would settle the issue. The Free Dictionary by Farlex states the following: “law of diminishing returns n. The tendency for a continuing application of effort or skill toward a particular project or goal to decline in effectiveness after a certain level of result has been achieved.” (http://www.thefreedictionary.com/law+of+diminishing+returns) I like this common sense definition because it is clear enough to explain the concept while avoiding the complexities of the economists’ definitions about units of production. To apply this law to research, increasing funding for research would be unproductive at some level, at least in the short run, because not enough trained researchers, lab space, and publishing outlets would be available to make efficient use of the increased funding. As was seen in past efforts such as ramping up research initiatives after Sputnik, ways are found to absorb the extra funding, though the argument might still be made about the utility of these heightened efforts. The counter argument to this point is that the United States is in a period of declining funding for research so that the STEM disciplines won’t face the problem of the law of diminishing returns anytime soon.

The issue during the Charleston debate most often revolved around funded STEM research, but research occurs in many other disciplines, some funded and some not. The issue of more research can then become time and expectations. In the Humanities, Social Sciences, and Fine Arts, university tenure and promotion committees are asking for more research because the competition for a limited number of tenured or tenure track positions allows them to increase research expectations. You also don’t have to be connected to higher education to create research. Independent scholars still publish their efforts, sometimes without any expectation of monetary gain but because they are passionate about their subject areas and wish to share what they have learned. With the increased ease of self-publishing, these researchers have ways to publish their research with relative ease and at a relatively low cost. The amateur naturalist or rock hound could even publish non-funded research in STEM disciplines. Is this increased amount of research good or bad? If no one looks at it, it’s perhaps irrelevant.

To continue my naïve view of research, I’m going to divide research into three categories that overlap. The first type is research that satisfies intellectual curiosity with few or no “practical” consequences. Whether or not Shakespeare wrote the plays attributed to him or whether a historical figure was a traitor or a loyalist may elicit great debate but has little impact on the “real” world. I would say the same for literary and fine arts criticism, though both can nurture the human spirit. Whether or not too much research exists in these areas may also be irrelevant since no one needs to pay much attention to it and outside funding is scant.

I would put much of social science research into the second category since it can influence public policy, determine whether someone made money in the stock market, or has a harmonious relationship with co-workers. Much library and information science research falls into this category, though I’m not sure that the research has made libraries any more effective. The usefulness of this research depends upon its accuracy, its general applicability, and whether policy makers pay any attention to it. Even if well done, this research may be valid only for a certain place or a certain time and will need to be redone as circumstances change. Replication may increase the ability to generalize findings but does not necessarily prove the inaccuracy of earlier research. The practical implications of any such research are often highly debated and often ignored by those who don’t agree with them. To use my favorite example of its imperfections, the stock market may be the most researched topic in the world; but the results of this research seldom guarantee profit over the long run. I would also put much medical research in this second category because microbes and humans change to adapt to their environment. The medicine that worked against a...
The nature of the problem may also depend upon the research is good or not changing conditions. We won’t change because of findings remain valid and flawed or the results are misinterpreted, the Physics unless the research methodology is at articles should act the same whether the test occurs same. The assumption is that high energy particles should be rewritten to areas, an exception to a generally accepted rule tests for bridges and other structures. In these areas, an exception to a generally accepted rule indicates that the rule needs to be compensated for all the possible variables to come up with valid results.

My third area for research is what I call natural laws where the same experiment should come up with the same results. I’d extend this area to engineering principles where the probability of an event happening is similar if the exact physical conditions apply such as stress tests for bridges and other structures. In these areas, an exception to a generally accepted rule indicates that the rule needs to be rewritten to take into account the exception. In this area, replication should apply if conditions are the same. The assumption is that high energy particles should act the same whether the test occurs at CERN or the Budker Institute of Nuclear Physics. Unless the research methodology is flawed or the results are misinterpreted, the findings remain valid and won’t change because of changing conditions.

Whether more research is good or not may also depend upon the nature of the problem. Gregor Mendel and his peas (genetics), August Kekulé and his dream of snakes (benzene rings), and Darwin and the theory of evolution all came about from one person’s brilliant insight. I don’t know if many current discoveries are made in the same way in areas other than mathematics, where I’ve read that brilliance rather than systematic research is needed to solve well-known problems. Perhaps future discoveries are even possible from examining why certain medical conditions are rarer in some places, as was the case in discovering the link between fluoride and tooth decay from the lack of cavities in some Texans. The more common case is those areas where research is needed to test a multitude of possible hypotheses. In medicine, researchers would need to test multiple drugs and multiple procedures to discover which ones are most successful in achieving the desired results. More research is most likely good in that it eliminates the negatives and allows researchers to move forward with positive results.

The final issue is the effect of the scholarly communication system on research. If more good research is needed, does a vast quantity of poor or mediocre research hinder good researchers by forcing them to wade through less than stellar papers? The issue is then how to foster good research and reduce poor or mediocre research, a goal easier to formulate than reach. The cover article of a recent issue of The Economist (October 19-25, 2013), “How Science Goes Wrong,” partially blamed the scholarly communication system for the poor quality of scientific findings. According to the article, the prestigious publications seek to publish “headline” science rather than good science and thus encourage researchers to test novel hypotheses. The article goes on to say that replications of important findings are rarely funded and that articles with negative results are rarely published though these article would be more useful in advancing science.

As I conclude this short column, I wonder why questions such as whether more research is good don’t get asked. The obvious answer is that to do so might call into question the entire system of research funding and scholarly communication that supports researchers, universities, publishers, vendors, and ultimately libraries. A person might suffer damage to her career if the answer were not a call for increased research funding. Several commentators to The Economist article worried that questioning the accuracy of scientific research would “fuel the very problematic anti-science movement.” Perhaps like so many aspects of the modern world, tweaking the current system is more acceptable and productive than questioning its fundamentals. On the other hand, perhaps much is to be gained by asking such basic questions.
Biz of Acq — Taking Advantage of Every Opportunity: Blending Local and Consortial DDA eBook Programs

by Tonia Graves (Electronic Resources & Serials Services Librarian, Old Dominion University, 4427 Hampton Blvd., Norfolk, VA 23529; Phone: 757-683-4188) <tgraves@odu.edu>

and Rob Tench (Acquisitions & Preservation Services Librarian, Old Dominion University, 4427 Hampton Blvd., Norfolk, VA 23529; Phone: 757-683-4144) <ftench@odu.edu>

and Anne Elguindi (Deputy Director, VIVA, George Mason University, 3351 Fairfax Drive, MS 1D1, Arlington, VA 22201; Phone: 703-993-4652) <aelguindi@gmu.edu>

Column Editor: Michelle Flinchbaugh (Acquisitions and Digital Scholarship Services Librarian, Albin O. Kuhn Library & Gallery, University of Maryland Baltimore County, 1000 Hilltop Circle, Baltimore, MD 21250; Phone: 410-455-6754; Fax: 410-455-1598) <flinchba@umbc.edu>

Introduction

Can you have too many demand-driven acquisitions (DDA) programs? Is one DDA program enough? In the Commonwealth of Virginia, we’re not sure how to answer the first question. However, our answer to the second question is an unequivocal NO! Well, that is at least true if you examine the experience of Old Dominion University (ODU) and the Virtual Library of Virginia (VIVA), the Commonwealth’s consortium of nonprofit academic libraries.

In the last 18 months, both organizations have implemented DDA pilots, and ODU participated in both of them. Because the same vendor was used for each pilot, it’s not surprising that the plans have similar characteristics. Both plans only include eBooks, and their basic acquisitions models match. They have similar browsing periods, and both allow unlimited simultaneous users, although the overall number of uses is limited for purchased titles. The programs differ in a number of ways, however, including the number of allowable Short Term Loans (STLs) before purchase, the kind and number of books available for use, and the maximum list price for titles (Figure 1).

These plans also have different challenges. The primary issues faced by ODU have been training staff, avoiding duplication, creating end-user awareness, and developing efficient workflows. VIVA’s primary issues have been communicating the plan effectively across the consortium and bringing publishers into the plan.

Some issues do affect both the individual library and the consortium, however. For both programs, record loading and record management are complex and challenging issues. Also, since both programs are pilots, creating and applying effective assessment tools to determine future viability and funding will be critical.

Old Dominion University DDA Background

Located in Norfolk, VA, Old Dominion University was founded in 1930 and currently serves just under 20,000 undergraduate and just over 5,000 graduate students. ODU offers 70 bachelor’s degrees, 54 master’s degrees, 42 doctoral degrees, and 2 educational specialist degrees. More than 70 degree programs are available through Distance Learning.

The University Libraries’ collections total approximately 3.2 million items, including over 1 million monographic volumes, over 20,000 journals and other serial publications, over 2 million microform units, and over 68,000 maps, computer data files, audiovisual, audio, film, and cartographic materials.

DDA at ODU

Like many other college and university libraries, ODU’s University Libraries have been coping with material budget issues over the last few years. In response to these challenges and in order to expand the universe of available titles and provide immediate access to materials, the University Libraries allocated funds to begin a DDA program in 2012. DDA would also serve the University’s extensive Distance Education Program.

In August 2012, the University Libraries selected EBL as its vendor and implemented a DDA eBook pilot program. New titles were based on the Library’s YBP existing monographic approval plan, and the plan only included titles published since 2010. All subjects were represented, although textbooks and popular titles were excluded, and the maximum prices were set at $300 per title and $30 per STL with staff mediating requests that exceeded the maximum limits.

Standard parameters for STLs, purchase triggers, loan periods, numbers of users, and course reserves were established. Three STLs were allowed, and on the fourth use of a title, the book was purchased. ODU opted for the seven-day STL, and, following the EBL model, once purchased, a title had 325 available loan days per year. Initially, 19,500 EBL titles were loaded into the libraries’ Sierra Integrated Library System (ILS), and duplicates were removed as they were discovered.

Figure 1: Basic Comparison – ODU and VIVA DDA Plans

<table>
<thead>
<tr>
<th>Plan Criteria</th>
<th>ODU Plan</th>
<th>VIVA Plan</th>
</tr>
</thead>
<tbody>
<tr>
<td>Subjects</td>
<td>All</td>
<td>Science, technology, engineering, mathematics, and health</td>
</tr>
<tr>
<td>Publishers</td>
<td>No restrictions</td>
<td>Added to the plan based on consortium request and negotiation by EBL</td>
</tr>
<tr>
<td>Publication date limit</td>
<td>2010</td>
<td>2012</td>
</tr>
<tr>
<td>Maximum list price</td>
<td>$300/title; $30/STL</td>
<td>$250/title</td>
</tr>
<tr>
<td>STLs before purchase</td>
<td>7 days</td>
<td>7 days</td>
</tr>
<tr>
<td>STLs before purchase</td>
<td>3</td>
<td>10, then 25</td>
</tr>
</tbody>
</table>

And there are several more speakers so be sure and look at the Charleston Conference Website for updates. www.katina.info/conference

We will have a change of pace for the Saturday Rump Session. There will be a Charleston Seminar Luncheon and program from noon to 3:30 organized by Michael Arthur, Meg White, Rebecca Seger, Jonathan Harwell, and others. More information will be posted on the Charleston Conference Website. www.katina.info/conference

Rumors

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debate proposition will be — “Wherever possible, library collections should be shaped by patrons, instead of by librarians.”
The DDA program has proven to be well-used by faculty and students, and by the end of FY13 (June 2013), almost the entire allocation of funds for the program had been expended. Consequently, additional funds were allocated to the program for FY14. From July 2012 to December 2013, over 1,850 STLs and almost 50 purchases had been made (Figure 2), and additional usage was represented by browses (Figure 3).

**VIVA DDA**

**Background**

The Virtual Library of Virginia, or VIVA, is the consortium of the nonprofit academic libraries within the Commonwealth of Virginia. Members include all 39 of Virginia’s state-assisted colleges and universities as well as 33 private, nonprofit institutions and the Library of Virginia.

**DDA within VIVA**

In the 2012/13 biennium, VIVA received new state funding for eBooks in the sciences, technology, engineering, medicine, and health (STEM-H) disciplines. One approach taken by the consortium was to pilot a DDA plan with EBL for the 2013-2014 academic year. As all of the products VIVA acquires are provided to the public institutions, ODU was included in this pilot. Twelve of the 33 private member institutions also decided to participate.

VIVA began its pilot with an initial load of 2,200 titles with new titles added into the plan each week. Publishers in the plan include John Wiley & Sons, Oxford University Press, Jossey-Bass, McGraw-Hill UK, and Sage. Publishers are often hesitant to participate in consortial DDA plans, wary of the possibility that they could cannibalize their own sales. The pilot approach was therefore key for VIVA not only because it kept the risk low for its members but also because it kept it low for the participating publishers.

Unlike ODU, VIVA’s plan was restricted to the STEM-H subjects. Because of the multiplier effect on purchases, the list price was set lower, at $250, and only books from 2012 forward were included. Purchased books are shared in perpetuity among the participating members with 278 seven-day loan periods per year, refreshed annually. The STL trigger to purchase was initially set for 10, but it was raised to 25 in October 2013 in order to maximize access to the STEM-H eBooks while keeping total costs within budget for the academic year. Usage has followed the typical semester pattern (Figure 4), and many titles have been used across multiple participating institutions (Figure 5).

**When the Consortial becomes Local**

One of the key challenges for member libraries with the VIVA plan has been record loading and management. The consortium does not have a shared catalog, and there is a wide variety of library systems among the members. In order to provide a central record source, VIVA collaborated with EBL and OCLC staff to implement a record management system for the plan through the WorldCat knowledge base (WCKB). This service allows member libraries to receive MARC records and updates that are customized with local preferences or provide direct access through WorldCat Local.

Although this service has effectively outsourced much of the record management for the plan from the consortium’s central office, member libraries still have the challenge of managing the records in their catalogs and discovery services. For ODU (and many
other VIVA libraries), using the WCKB as a record delivery service was entirely new. Local procedures and documentation continue to develop, as do troubleshooting and effective error reporting skills, and the distinction between the local and consortial plan can cause confusion.

In addition to confusion about record management, the VIV A plan also adds complexity for ODU and other member libraries with local EBL plans through the possibility of duplicated titles. In order to avoid duplicates, there is a manual check completed at EBL once a month. Libraries are alerted to any duplicate titles so they can make a decision about keeping or pulling them on a case by case basis.

Looking to the Future

If ODU continues to blend local and consortial DDA programs, it will create a number of interesting questions. ODU selectors already wrestle with how and if they should “select around” the titles on VIV A’s plan, and that is while it is still in a pilot phase. Usage in a DDA program is also a complex issue, such as comparing a browse to a loan, identifying usage within the loan period, and noting continuing use after a title has been purchased. Collection development personnel at ODU have begun the discussion of how DDA usage, both at the local and the consortial level, can be likened to the usage of other eBook collections so that the benefits and costs of each can be fairly compared.

The positive impact of VIVA’s DDA plan on ODU’s collections and services, however, is clear for the simple reason that it is getting used. From July to December 2013, ODU users made 535 downloads of 222 titles — titles that ODU otherwise might not have been able to provide. As there are different advantages to each DDA program, it seems likely that ODU will continue to wrestle with the challenge of multiple DDA programs as long as the projects continue.

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Optimizing Library Services — Access to Service Keeps the Academic Library Community Busy These Days

by Janice M. Krueger, Ed.D. (Associate Professor, Department of Library Science, Clarion University of Pennsylvania) <jkrueger@clarion.edu>

Column Editors: Lindsay Johnston (Managing Director, IGI Global) <ljohnston@igi-global.com>

and Kristen Stauffer (Library Relations Coordinator, IGI Global) <kstauffer@igi-global.com>

Ever since the Internet inspired the creation of Web-based, accessible materials, many libraries have developed a Web presence so their service populations can access information and various library materials. New, emerging technologies continually create more effective ways for managing, searching, retrieving, storing, and preserving information, data, records, and important documents.

While keeping abreast of new technologies poses challenges, academic libraries, in particular, consider this as an opportunity to improve access to new expressions of content for their users. In many ways, improving access is synonymous with improving services and a look at past endeavors along with current happenings gives direction for the future.

In the early years, the library catalog was the focus of attention. Academic libraries created and built legacy systems in an effort to automate the catalog and various technical services functions. The catalog offered patrons quicker access to the library’s holdings and, theoretically, technical services librarians and staff were able to deliver materials to the stacks faster for patron use. Gradually, though, the catalog was considered an inaccurate representation of a library’s possessions due to the influx of journals that resided in aggregator databases that became part of the initial online products for libraries courtesy of the Internet. Also, many librarians were hesitant to use the 856 field in the MARC catalog record because the links would often break as publishers perfected their online platforms. Many concluded that the legacy system catalog would become extinct in a Web-based environment.

The academic library community was understandably excited when Serials Solutions offered a way to produce an A-Z list of journal holdings residing in online databases, the OpenURL ushered in SFX (and subsequent variations) for linking between databases, and vendor records and durable links could be added to the library catalog with less concern as to their accuracy. Proprietary integrated library systems offered more seamless ways to handle the daily activities for acquisitions, serials, and cataloging. Additional products for federated searching and digitizing items typically held in special collections were developed and electronic resource management systems were introduced to assist librarians with managing the numerous licensing agreements and subscription information that accompanied each journal, database, or online resource. Despite these terrific advances, new challenges arise on a regular basis.

So what activities are keeping the academic library community busy these days?

Issues and Challenges

I recently edited a book for IGI Global that focuses on the answer to this very question, Cases on Electronic Records and Resource Management Implementation in Diverse Environments is a collection of examples of electronic records and resource management implementation in various settings. Section 1 of the title contains a number of chapters discussing the ongoing issues in academic library communities that impact the level of access, and ultimately service, that the library can offer its patrons.

continued on page 65
In many respects the challenges are either the same or similar as librarians and staff are dealing with new or open technologies to process information for catalogs, to build digital repositories for research and special collections, to manage licenses and subscriptions, and to enhance search functions across all content, whether owned, licensed, or Web-based. What is noticeably different is the increase in the amounts and types of content being offered through improved levels of access.

The ease and accuracy of batch loading vendor records for electronic collections into the catalog remains a concern and can vary in workload according to the specific proprietary or open source integrated library system in use. In some instances an additional program, MarcEdit, can be used to address inconsistencies or lack of information in the record. In other situations, the OPAC display of the record requires alterations to make it more user friendly with regard to description, location, and links. Differences in electronic format type, such as those between journals, books, streaming music, and streaming video also call for specific solutions.

Overall, policy decisions, at the local, consortia, or both levels, are necessary to stipulate an acceptable length of time to edit the record before making it public and accessible. On the horizon and underway are issues associated with the recent change in cataloging standards— that is, the move to Resource Description and Access (RDA). As catalogers begin to use the new standards and as vendors produce records according to RDA, records created according to both sets of standards will exist together, producing obvious inconsistencies for users.

Digital Repositories and Open Source Initiatives

Digital repositories remain a priority. Faculty or student research continues to be preserved and shared through institutional repositories. While levels of access for nonaffiliated users may vary, many open access initiatives have gained momentum and academic libraries play key roles in their development as well as those initiatives having more complex issues. The University of North Texas Libraries’ work with electronic theses and dissertations in music serves as a good example. Since doctoral work in music often requires accompanying files for performance and recitals, appropriately cataloging, linking, and preserving streaming audio files for the University of North Texas community are a concern, especially since older formats, such as cassette tapes and compact discs are no longer the norm. The digitization of special collections in academic libraries creates public access to additional, unique, and valuable information and content. A noteworthy example is the Topaz Japanese-American Relocation Center Digital Collection at Utah State University’s Merrill-Cazier Library. Originally undertaken to support a freshman orientation course, it remains as part of a larger collection of the Mountain West Digital Library. Also noteworthy are the efforts of the National Taiwan University Library in building an accessible database for the digital photographs and videos documenting the cultures of the indigenous Taiwan people.

Open source initiatives for library operations are now considered by some to be a viable option to the proprietary library systems and associated products that have emerged over the past five to ten years. Open source Electronic Resource Management Systems (ERMS) have been implemented by some academic librarians and, as with any computer application and program, advantages and disadvantages are evident. One definite advantage for both the library and the user is that subscription information can be made available in the OPAC so the library patron can easily see what content is or is not accessible, especially with regard to journal literature.

New Models

All of the above are good and relevant examples of how academic libraries are serving their respective user groups by improving upon available technologies to create content and make it more accessible. There is movement, however, towards new models of library solutions that can reduce the silos of information that are produced by integrated library systems, content management systems for digital objects, federated search products, and other programs that have been designed to work in conjunction with library systems.
Discovery programs offer effective, efficient, and relevant search results by drawing from data and records residing in a library’s catalog, databases, online subscriptions, linked Websites, linked resources, and print holdings.

**EBSCO Discovery Services and the Summon Service** are two search tools that have been in place for a few years and deliver content more efficiently than the earlier federated search products. Using a discovery program can position an academic library to increase access services for library and, in some cases, institutional content.

Serious attention needs to be given to the next generation of library systems, linked data on the Semantic Web, and metadata. The integrated library systems now in use are based on the systems of the past. The key vendors in library solutions are now marketing their next generation library management systems that promise to unify library operations across all formats even more seamlessly than before via cloud technology. The next generation systems are designed to not only handle traditional library processes and content but can now address collaborative collection development across libraries and include different content, such as data sets produced during research. Additional key benefits available are the incorporation of usage data, cost per use information, and peer collection comparisons to assist with collection development and the integration of electronic license and subscription information for license management. The new catch phrase seems to be uniform resource management.

**Metadata Management**

A distinctive capability involves metadata. There is a new emphasis on collaboration with regard to metadata management. A definite focus on the sharing of metadata structures and ontologies, adaptable to local needs, is prominent in the library management systems entering the marketplace. Undoubtedly, this feature would assist academic librarians when developing institutional repositories of faculty and student research and creating digital collections of unique and special collections, such as the Topaz Japanese-American Relocation Center Digital Collection at Utah State University’s Merrill-Cazier Library and the cultural database of the indigenous Taiwan people at National Taiwan University Library. One result of shared metadata is increased and improved access to all sorts of content, data, and information.

One cannot help wondering, though, if there is more behind the idea of shared metadata management being introduced into library systems, especially those directed at academic and research communities. An obvious conclusion reached after reading Karen Coyle’s series of articles in Library Technology Reports is that metadata plays a key role in connecting and linking data on the Web. She sees the library community’s acceptance of the Functional Requirements for Bibliographic Records (FRBR), RDA, and the desire of the Library of Congress to transition to a new bibliographic framework embracing Semantic Web technologies as a way for libraries to move away from creating and storing silos of information and content.

**The Semantic Web**

It is imperative that libraries, especially academic and research libraries, embrace the idea of shared, linked data across the Web. After all, in many respects, this is where knowledge and content are created, organized, and preserved for future access. Academic librarians and the information technology staff servicing the library have developed an expertise over time with regard to library solutions and technologies currently used. This expertise is needed to decipher and interpret the Semantic Web technologies and programming as they relate to library materials and created content. In her description of the Semantic Web and linked data, Coyle (2012) discusses approximately twenty data element and class structures currently in use to describe Web resources, people, places, intellectual property rights, citations, bibliographic expressions, authorities, and preservation. There are also approximately twenty or so corresponding controlled vocabularies, subject lists, and thesauri for use with Web resources, library, and non-library materials and information. Completing the list are twenty or more Semantic Web development and software creation tools. While much of the elements, classes, properties, and vocabularies can be created algorithmically, human intervention is required to effectively create meaningful links to rich content. Academic libraries have cultivated the human expertise needed to extract the commonalities in metadata elements and properties necessary to make linked data work for libraries.

Coyle (2012) points out that, so far, only programmers and developers are comfortable using and working with linked data technologies for the most part. She indicates that the original goal of the Semantic Web was to produce a web of data embedded in HTML documents instead of joining together discrete sets of Web-based data. Given the different intricacies of schemes, structures, and mark-up languages used to organize data and make it linkable, programmer and developer interest is understandable and not surprising. This also could explain the amount and variety of data elements and the number of subject lists and thesauri that have developed since each one would most likely be working within his or her area of interest, discipline, or profession. To date, most of the activity has centered on scientific, particularly biomedical, research and government information. In order to expand the user base for Semantic Web technologies, Coyle emphasizes the need for a user-friendly interface to facilitate the use of linked data.

**The Library’s Role**

This is where the academic library can become a key player and raise the level of its services. Academic librarians, especially those engaged in technical services and systems activities, can refocus their energies towards the future implications of linked data for libraries. Building on the previous work of programmers and developers, librarians can become collaborative leaders in designing tools and applications that will offer to any user a friendly, intuitive interface that becomes a gateway to an even greater variety of materials, such as scientific and medical research, historical content, special collections, government information, and publications, just to name a few. It is time for academic libraries to stop creating and maintaining silos of information that provide access via library portals. Instead, library content should link out to Web content and Web content should link to library content seamlessly, by passing specialized Web pages, portals, or catalogs.

**References**


Janice M. Krueger, Ed.D. is an associate professor in the Department of Library Science at Clarion University of Pennsylvania. Her major responsibilities center on preparing students for varied library careers through the Master of Science in Library Science degree and school library media programs. She has experienced many aspects of librarianship through her prior work in public, academic, and law libraries. Her research interests focus on information literacy and emerging technologies for libraries. She enjoys music, reading, bike riding, and walking in her spare time. Most recently, she is the editor of the IGI Global publication, Cases on Electronic Records and Resource Management Implementation in Diverse Environments.
The use of media in the classroom is ubiquitous. Visual theses are on the rise. Academic interest in and classroom use of documentary film and global cinemas is growing at an exponential rate. Resultantly, the importance of a rich and varied media resources collection is essential to academic institutions, public libraries, and K-12 media centers. It takes a lot of work, development, and research to maintain and grow a collection like this. Resources that aid in this process are invaluable...

In writing this column for a little over a year, I’ve touched on many elements of collection development for Media from pedagogy to copyright to nuts and bolts information on streaming media, distribution, and professional development organizations. Looking back, I was struck by the lack of discussion on the films themselves, which is undoubtedly one of the reasons I most enjoy working with a Media collection. So, I will be presenting a multi-edition article, offering a few short lists of Documentaries to note, some of which resonate in our collection here at the UNC or have spurred considerable conversations at screenings I have attended. I am not sure that I could arrange these in some sort of “top 10” order, as each offers something unique and memorable. So, here in alphabetical order, are the first of the lot:

**American Promise (2013)**
- Director: Joe Brewster and Michèle Stephenson

This very unique, relentlessly persistent and unabashedly intimate observational documentary focuses on the lives of two African American boys, Idris and his best friend Seun, as they grow up in New York City. Filmmakers Michèle Stephenson and her husband Joe Brewster (Idris’ parents) doggedly follow their son and his friend for thirteen years through the highs and lows of childhood and adolescence; from their first days excitedly toddling off to kindergarten up through touring potential colleges and graduating high school.

As the film progresses, we see both children enroll in a highly esteemed Manhattan Upper East Side private school — the Dalton School. Eventually, though, circumstances lead Idris, Seun, and their families down very different (and at times, heartbreaking) paths.

This film is complex, layered and immensely intense, rather effectively accomplishing what it sets out to do: bringing to glaring light the complications of minority students seeking private education. Brewster and Stephenson do not shy away from depicting the markedly high emotional and economic toll involved in such a pursuit, with many scenes intimately underscoring the numerous hurdles each family faces. And, given their incredible access, the audience follows it all, going where Idris and Seun go — into their classrooms, their homes, and their lives. What results is a vivid and unflinching examination of two young men’s very personal journeys and their push to achieve to the absolute best of their abilities.

*This documentary would find resonance in these subject areas: African American studies, Education, Social Issues, and Urban studies.

**Distributed by:** Ro*Co Films Educational

**Further viewing:** Brooklyn Castle, Waiting for Superman, The Big School Lottery.

**Garbage Dreams (2009)**
- Director: Mai Iskander

It is almost inconceivable that Cairo, the largest city in the Middle East, with a population of 18 million people has had no citywide waste disposal system for centuries. Instead, they have relied on one group of people to collect, sort, recycle, re-use and dispose of the city’s garbage, the Zabaleen. Averaging 80% recycling rates, they are extremely effective in their work (in comparison, most European companies barely achieve 20% recycling rates). Unfortunately, the city is beginning to hire private companies from Spain and Italy to officially manage the trash and the Zabaleen must fight for their livelihood. Director Mai Iskander’s steadily observes this dilemma and what members of the Zabaleen community do to face it over the course of four years, focusing on three teenage Zabaleen boys — Adham, Nabil, and Osama, and one resident social worker, Laila. Through a series of achingly earnest interviews, with many filmed by the boys themselves, deeply moving personal narratives emerge and reveal a communal coming of age story that proves to be the heart of the film.

**Adham** and **Nabil** are invited to visit Wales to see how other countries collect trash and recycle. Excited by the prospect of traveling abroad, their youth and the naiveté of their world experience are starkly contrasted with their advanced vocational acumen. Their pragmatic world view on the art of recycling and reuse is poignantly pronounced as Adham is perceptively astonished by the amount of trash not being recycled at the plant in Wales, asserting that “every piece should be recycled” to which their Welsh host comments “that is impossible.” Watching the rest of the seemingly un-recyclable items making their way down the conveyor belt to the landfill pile, Nabil counters — “here there is technology, but no precision.” We’re left to surmise that the folks in Wales should be visiting the Zaballen instead. This film successfully underscores the importance of learning globally in conjunction with thinking globally.

*This documentary would find resonance in these subject areas: Environmental studies, Middle Eastern studies, Social Issues, Sustainability, and Urban studies.

**Distributed by:** Thalia Films Educational

**Further viewing:** Waste Land, Garbage Warrior, Recycled Life.

**The Harvest** / *La Cosecha* (2011)
- Director: U. Robert Romano

U. Robert Romano’s compelling vérité film follows three juvenile migrant workers as they labor with their parents in fields throughout the United States, with their earnings contributing sizably to their family’s survival. Over the course of a year, we witness Zulema, Perla, and Victor chasing the harvest through the seasons and across the U.S., missing school, their homes, their friends, and ultimately their childhood.

**Victor** is an engaging 16-year-old who must decide daily between school and work. Extremely devoted to his family, he does not hesitate to choose work. As Victor protectively walks his little sisters to the school bus one morning, he rationalizes aloud that the girls will be well fed and cared for while he labors in the fields, hauling 1,500 lbs of tomatoes to earn $60 for his family. Twelve-year-old Zulema wonders if she will ever make it to high school. A third generation migrant worker, Zulema began picking strawberries and other crops when she was only 7 years old, stating, “The plants when I was 10, looked like skyscrapers...” Perla Sanchez’s biggest hope is to finish school, go to college, and then graduate school to become a lawyer. But her dreams are fading with each school she leaves behind as she is forced to continually join her family on the road as they travel from farm to farm looking for work. The earnest reflections from these children and their parents will take root, making you look at the farms, fields, and produce you see daily with different perspective.

*This documentary would find resonance in these subject areas: Agricultural labor, Child Labor, Economic conditions, Environmental studies, Human Rights, and Social Conditions.

**Distributed by:** Cinema Libre

**Further viewing:** Harvest of Shame, Elisha and the Cacao, Journey of the Roses.
**The Interrupters**  
**Director Steve James**

The first several moments of this film set the scene of a year in the life of a city grappling with extreme, prolific violence. A barrage of voiceovers from numerous Chicago newscasts report murder upon murder occurring in the city; 2009 was rife with violent shootings, many involving school-aged youth, including the much publicized brutal beating and murder of 16-year-old Derrion Albert. Directed by noted documentary filmmaker (Hoop Dreams) Steve James, the film was inspired by an article written by Alex Kotlowitz and focuses on the imperative work of CeaseFire — an initiative of the Chicago Project for Violence Prevention aiming to reduce street violence through a uniquely tailored approach to outreach. Epidemiologist Gary Slutkin, founded CeaseFire after spending most of his career battling infectious diseases like TB, Cholera, and AIDS in countries across the world. Upon returning to his hometown of Chicago in 1995, Slutkin was struck by the level of street violence in the city. Drawing parallels between infectious diseases and violence, Slutkin posited that it should be addressed the same way — by containing the spread of the disease and preventing further transmission.

Through their work, they concluded that people from the life would have more knowledge of how to forecast, find, and intercept potential violence than those with no experience. These “Violence interrupters” are uniquely prepared outreach workers striving to provide conflict mediation, safe havens, mentoring, and alternatives to violence. The film focuses on three: Ameena Matthews, Ricardo “Cobe” Williams, and Eddie Bocanegra with James afforded incredible access to them and other key members of CeaseFire. Violence interrupters and mentees alike seem almost unaware of the cameras following them throughout the city. Many interactions, layered and intricate — find measures of success and failure with an epilogue providing some closure for many of the stories introduced in the film.

*This documentary would find resonance in these subject areas: Adolescence, African American Studies, American Studies, Crime, Gang prevention, Latin American Studies, Rehabilitation, Sociology, Urban Studies, and Women’s Studies.*

Distributed by: ISKA  
**Further Viewing:** Welcome 2 Durham, Gang Wars, Slippin*: Ten years with the Bloods.

**La Isla: Archives of a Tragedy (2009)**  
**Director Uli Stelzner**

In 2005, a sudden explosion rocks a police training barracks in the capital city of Guatemala. The explosion unearthed a shocking discovery of a secret archive housing thousands of records amassed by the Guatemalan police and army dating back to the 1930s up through the end of the civil war. Director Uli Stelzner’s film follows as 190 people are employed to review and report on the records found in the archive. Many researchers find unexpected information about their families; others uncover atrocities, too gruesome to imagine. All of them work diligently together to bring to light what happened to tens of thousands of people who vanished over a period of decades leading up to the end of the civil war. Eventually, some of the researchers find peace in knowing “the names of the students, teachers, workers, and peasants [previously] hidden in the consciences of soldiers…”

The slow and steady pace of this somber, contemplative film is underscored by the quietly cinematic quality of the scenes. Archival footage and photos are effectively woven throughout (some depicting graphic violence) offering the audience complete entry into the police archives as the researchers experience their work. Ultimately, this is a multi-layered, artistically drawn elegy to the thousands of people murdered by the army and secret police.

*This documentary would find resonance in these subject areas: Archives, Genocide, Guatemala, Latin America, and Political Violence.*

Distributed by: ISKA  
**Further Viewing:** A film Unfinished, Granito — a story in three parts, In Rwanda we Say.

**Sofía’s Last Ambulance (2013)**  
**Director Ilian Metev**

Director Ilian Metev loses no time in letting us know that while there are 1.2 million people living in Sofia, the capital of Bulgaria — there is a shocking dearth of ambulances. And, we quickly find that those that run can scarcely cover the capital city’s population and are wildly overburdened. This is an observational documentary in its truest sense, deftly accomplished with Metev placing three cameras on the dashboard of one of these few remaining ambulances. In doing so, Metev provides a very precise view of its medic team. Here, we are introduced to an ever-earnest Dr. Krassimir Yordanov; the puckily stoic paramedic Mila Mikhailova; and the quietly enigmatic driver, Plamen Slavkov. And what we see through these cameras is painfully human, increasingly stressful, and immensely absorbing. With their close proximity, what the cameras capture has the potential to appear uncomfortably claustrophobic but it succeeds instead in bringing a spectacular intimacy. Krassimir, Mila, and Plamen’s natural ease in front of the cameras undoubtedly benefit the film. While not an overly verbal group, their keenly expressive faces tell a lion’s share of the story, that of a city’s crumbling healthcare system. Any gaps are cleverly filled in with a series of sporadic radio dispatches and the steady stream of cases answered by the team.

Some of their house calls are absurdly comical, while others are expectedly tragic. Yet, as we ride with the ambulance team into a sunrise, the camera seems to catch a melancholy comfort in the enduring fortitude of these public servants, leaving the audience with a subtle sense that everything may turn out okay.

*This documentary would find resonance in these subject areas: Eastern European studies, Health Care, Social Conditions, and Urban Studies.*

Distributed by: N/A  
**Further Viewing:** Pablo’s Winter, countryside 35 x 45.

**Summer Pasture (2010)**  
**Directors Tsering Perlo, Lynn True, and Nelson Walker III**

Nomads have lived in the Kham region of Tibet (now part of the Sichuan Province in China) for 8000 years. Here, breathtakingly beautiful mountains lead down into smooth green pastures, but at an elevation of 15,000 feet, this gorgeous grassland suffers brutal cold through all seasons except summer. Yet, the tent of Locho, Yama, and their chubby baby girl seems to remain warm throughout…

At once exotic and oddly familiar, this lush observational documentary presents the story of a young nomadic Tibetan family — Locho, Yama, and their baby girl — struggling to survive on the revenues of caterpillar fungus and yak herding. Perhaps a testament to the steady documentary filmmaking of Lynn True, Nelson Walker III, and Tsering Perlo — or just the mettle of the subjects themselves — the film rather successfully captures a young couple who are unabashedly earnest, unusually at ease in front of the camera, and unavoidably endearing. Either way, the audience is rewarded with a deeply satisfying, compelling visual experience. Somehow, Yama makes her daily work of raking yak dung a subtle art form and we find Locho’s vanity and compulsive applications of Noxema quirky and charming. The filmmakers skilfully juxtapose sweeping shots of the serene yet frigid pastures with cozily intimate interiors of the family’s warm tent. While the film admittedly focuses on one family, it speaks volumes to the tensions between tradition and modernity in a country experiencing great change. Ultimately, this is a very modern love story set in the most traditional of ancient cultures. The film deftly captures this formation about their families. Others uncover potential violence than those with no experience.

*This documentary would find resonance in these subject areas: China, Economic conditions, Ethnology, Nomadic People, Social Conditions, and South Asia.*

Distributed by: Documentary Educational Resources  
**Further Viewing:** The Last Shepherd, Ito - Diary of an Urban Priest, Position among the stars.
Wandering the Web — Subcultures: Steampunk Websites, A Guarantee of Unique Amusement

by Patty Teague (Home Delivery Coordinator, Warren County Public Library, Bowling Green, KY)

Column Editor: Jack G. Montgomery (Professor, Coordinator, Collection Services, Western Kentucky University Libraries)  
<jack.montgomery@wku.edu>

Column Editor’s Note: Several years ago, as our musical group Watersprite began playing at an outdoor festival near Nashville, Tennessee, I could not help noticing several people in rather unique costumes wandering in the crowd. During our break, I approached them to find that they belonged to a subculture called “Steampunk,” which one member of the group called “a serious lifestyle choice.” Being fascinated with subcultures and alternative lifestyles since the 1970s, I explored the Steampunk phenomenon and discovered that this movement started as a genre of speculative science fiction that takes its inspiration from the outdated 19th-century steam powered machinery, as well as Edwardian and Victorian culture, and turned it into a literary vision of a post-apocalyptic world, where steam and the complex machinery it powered have returned to prominence in an alternate version of history. It is also a social reaction to modern mass production, anti-individualism that seeks to return to handcrafted, individually reengineered products that feature exposed gear work and attention to elaborate styling. — JM

This vision has inspired an entire movement in aesthetics, art, music, fashion, literature, cultural events, and movies that reflect an encompassing lifestyle which has spawned its own community. Though Steampunk as a term did not emerge into mainstream culture until the 1980s, some of its thematic roots go back to the 1920s with movies like Fritz Lang’s silent sci-fi masterpiece, “Metropolis,” and even to various 19th-century novels by Jules Verne and H.G. Wells. Other visual media expressions include 1960s television’s pseudo-western, “The Wild, Wild West” and films like the Japanese animation classic “Howl’s Moving Castle,” as well as movies like “Hellboy,” “Brazil,” and “The League of Extraordinary Gentlemen,” to name a few. All of these expressions elaborate the dark, often anachronistic, claustrophobic, yet romantic vision of Steampunk. In my travels, I located a local individual who is currently active in the Steampunk movement and known to be an authority. Even more special is the fact that she is professionally associated with our local public library. These are her recommended sites and annotations.

General Steampunk Information Sites

www.steampunkbible.com — An online outgrowth of a print book of the same name, The Steampunk Bible attempts to index Websites, artists, authors, and makers who are significant to the Steampunk community.

www.steampunk.com — A blog chronicling all things Steampunk. This blog covers Steampunk in popular culture and media, such as television shows and fiction, a resources Website list, guests, jewelry, every aspect of Steampunk.

Steampunk Clothing

www.clockworkcouture.com — This is a retail clothing site with reasonable prices.

www.steampunkemporium.com — Another clothing site providing more traditional period piece clothing for everyone, especially accessories for both men and women, and it also has a sales page.

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And They Were There

Reports of Meetings — 33rd Annual Charleston Conference

Issues in Book and Serial Acquisition, “Too Much is Not Enough!” — Francis Marion Hotel, Embassy Suites Historic Downtown, Courtyard Marriott Historic District, Addleston Library, College of Charleston, and School of Science and Mathematics Building, Charleston, SC — November 6-9, 2013

Charleston Conference Reports compiled by: Ramune K. Kubilius (Northwestern University, Galter Health Sciences Library) <r-kubilius@northwestern.edu>

Column Editor’s Note: Thank you to all of the Charleston Conference attendees who agreed to write short reports that highlight sessions they attended at the 2013 conference. All attempts were made to provide a broad coverage of sessions, and notes are included in the reports to reflect known changes in the session titles or presenters, highlighting those that were not printed in the conference’s final program (though some may have been reflected in the online program). Please visit the Conference Website, http://www.katina.info/conference, for the online conference schedule from which there are links to many presenters’ PowerPoint slides and handouts, plenary session videos, and conference reports by the 2013 Charleston Conference blogger, Donald T. Hawkins. Visit the conference blog at: http://www.katina.info/conference/charleston-conference-blog/. The 2013 Charleston Conference Proceedings will be published in partnership with Purdue University Press in 2014. — RKK

WEDNESDAY, NOVEMBER 6, 2013

PRECONFERENCE

SelfPub 2.0 — Presented by Mitchell Davis, Moderator (BiblioLabs); Eleanor Cook (East Carolina University); Bill Gladstone (Waterside Productions); Deb Hoadley (MA eBook Project); Robert P. Holley (Wayne State University School of Library & Information Science); William Kane (Wake Forest University); Leslie Lees (ebrary); Michael Levine-Clark (University of Denver); Bob Nardini (Ingram Library Services); Matt Nauman (YBP Library Services); Cyril Oberlander (SUNY College at Geneseo); Joyce Skokut (Ingram Library Services); John Shearer (UNC Press); Charles Watsonson (Purdue University Press)

Reported by: Eleanor I. Cook (Assistant Director for Discovery & Technology Services, Joyner Library, East Carolina University, Greenville, NC) <cooke@ecu.edu>

This preconference covered a range of angles reflecting upon the phenomenon known as self-publishing. Current trends were examined and predictions made. Here are a few highlights from a diverse set of speakers. The session was sponsored and conceived by the folks who run BiblioLabs and BiblioBoard. Papers from this preconference will be represented in the Charleston Conference Proceedings and another publication is also being spun off independently.

Mark Sandler, Director of the Center for Library Initiatives (CLI) for the Committee on Institutional Cooperation (CIC), served as the first keynote speaker. Sandler made interesting observations about academic library collections, delivered with dry humor. He noted that CIC, which includes fifteen large research libraries, cooperates on many fronts and as far as he knows, holds the largest single toilet paper contract in the world. The CIC universities boast 108 Nobel laureates, and place a high value on research. There is a great deal of money to be spent keeping up with all this research, and there are plenty of enterprises just waiting to help them to do just that. Sandler notes that academic libraries are like giant reverse vending machines; they gather up not only the best of the best, but pretty much everything else except perhaps the very worst publications.

So, what happens to academic library collecting when scholarly communication begins to spread itself all over the place on platforms and in formats not easily gathered up as before? There are so many new avenues of dissemination — such as Flickr, Hulu, and arXiv.org (among others). This is a whole world not yet captured by academic libraries. On top of this, over 40% of all new books today are self-published. Therefore, vast quantities of possibly relevant materials are not being vetted by research libraries that probably need review, and may deserve acquisition and preservation.

Sandler made a creative analogy which was one of his best take-aways. Academic libraries’ efforts to review, select, and promote scholarly content have, in the past, been like a mainstream grocery store inventory, which depends on national brands and low margins. These stores buy brands from outside suppliers that help convey value to the store. One might shop at Kroger and select brands such as Campbell’s, Del Monte, etc., which libraries buying materials from ProQuest, Elsevier, Oxford, etc.) In the Whole Foods model, which includes specialty brands and high margins, the store brand conveys its own value. (Some traditional stores are copying this model as well.) In this model, the enterprise controls the process from the means of production through the distribution. Should academic libraries control the product from its inception? Can academic libraries bring order to chaos and help democratize scholarship? If not, we may see a continued co-dependence of big libraries, big research, and big publishers.

The second session was a panel with each presenter discussing libraries as publisher. Several projects were described. John Sherer from the University of North Carolina Press discussed a civil rights movement project which is Mellon grant-funded. They are collaborating with several UNC library departments on this. They view future monograph publishing in a completely new model. Many of their publications are open access now and will be more so in the future. The “information scarcity” model is no longer viable.

Charles Watkinson from the Purdue University Press described their two-pronged approach to the support of scholarly publishing. The press is part of the library at Purdue. Their PUP sector publishes branded, peer-reviewed works and their SPS sector provides publication opportunities for less formal works such as technical reports and conference proceedings. In fact, the Charleston Conference Proceedings are now published through this channel. He provided an example of how the Purdue Library and Press were able to save some transportation technical reports that were languishing in the hallway of a classroom building. These reports are now available digitally and are being sought after and used.

Bill Kane, Director of Digital Publishing at Wake Forest University, described a digital publishing initiative that he is heading up there. The publications are from the university community and draw from many disciplines and areas. Many of the publications are open access and or print-on-demand. Since the university press focuses on Irish poetry as its specialty, digital publishing@Wake (http://digitalpublishing.wfu.edu/) provides additional opportunities for a variety of types of publishing.

The last member of the panel was Cyril Oberlander, the library director at SUNY-Geneseo. There, the library is actively supporting and publishing faculty publications and is supporting a textbook production program that is SUNY-wide. They were able to do this by reframing their technical services structure...
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**Accoutrements and Accessories**
www.museumreplicas.com — A Website of purchasable replicas of historic items and articles, including a Steampunk collection. This site goes further than just clothes, into weapons, jewelry, gadgets, and décor items.
www.blondeswan.com — This is a site almost exclusively dedicated to hats of all kinds, of high-quality construction.

**Music**
http://www.steampunk-music.com/ — This would be the online music magazine for Steampunk. Their tag line says it all — “the Sound of a World that might have been.”
http://www.abneypark.com — Abney Park formed in Seattle and is a tasty blend of industrial and world music with Steampunk-flavored lyrics.
http://www.thomasdolby.com — Yes, that Thomas Dolby. After blinding us with science, he kept going with atmospheric music. His latest work is music for an immersive multi-player game, “A Map of the Floating City.”
http://www.clockworkquartet.com/ — The members of the Clockwork Quartet vary in age from 13 to 28, according to their site which began as a multi-media project, with a graphic novel, art, and music. They specialize in ballads of an alternate England, tales of love, and revenge.

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to assist with this. They appear to have a robust support mechanism with the development of a “Library Publishing Toolkit.”

The next panel was moderated by Bob Nardini from Coutts and focused on vendor services to self-publishing. Michael Levine-Clark (University of Denver) began the session by asking, “How radically will the scholarly book publishing landscape change in the next five years?” As it is now, librarians rely on others in the publishing and distribution sector to assist them with vetting content. The peer-review process, publishers, approval vendors, and eBook aggregators all have a hand in pre-selection of what libraries eventually acquire. The explosion in self-publishing is bound to have some effect on this. Will libraries want to provide access to self-published books? This is a trend we simply cannot ignore, but there are questions. If there are “good” academic books being self-published, then how do we find them? Scholars’ attitudes towards self-published materials may be changing, and if so, how will we change with them? It seems that niche scholarly areas could benefit from self-publishing opportunities. Another question raised is how to deal with established scholarly authors who write off-the-wall books on topics outside their established areas of expertise. An example: an electrical engineering professor who also publishes materials on holocaust denial.

Matt Nauman from YBP Library Services presented next. He noted that the heyday of the vanity press, while not totally over, is forever changed by the huge increases in self-publishing opportunities. He observed that self-publishing may be more about networking rather than book publishing, and that we need to monitor this and listen to what our customers want.

Joyce Skocut from Ingram presented next. She illustrated that self-publishing is indeed part of a huge iceberg where mainstream publishers represent only the tip. A number of famous authors started out with self-publishing. Many talented writers never can break through the rejection piles of the big companies but turn to self-publishing as an alternative. A number of successful self-published authors go on to get recognized by larger publishers once they have established a following. So why do authors opt for self-publishing? Skocut outlined a number of reasons. More control over the finished product, the ability to control marketing, direct use of social media, delivery faster to market, and design control issues all make self-publishing attractive. Of course the flip side to this is the author has to do all or much of the work, or employ author services companies to do pieces of it for them, which can be expensive.

However, with no publisher contract to deal with, the author makes all the money and can retain all the rights.

Skocut then went on to discuss librarians’ concerns about discovering these hidden gems. Vendors should work with their customers to determine criteria and expectations for both library collection development goals and end-reader interests. One concern is that a title might be discovered too late, but as one public library director was quoted, “If the work is good, it’s never too late to promote it.” In order to develop regional and subject profiles, better metadata needs to be collected earlier. She also mentioned a product called IngramSpark that her company was making available to independent publishers and self-publishing authors. While academic libraries are developing self-publishing support programs for scholarly works, public libraries have been a bit slower to go in this direction. However, a good example of a project developed by a public library was described. Williamston (NC) Public Library published a children’s book that helps “sell” the library and the proceeds go to the Friends of the Library.

Deb Hoadley was the final presenter of this panel. She serves as the eBook Project Lead for the Massachusetts Library System. She discussed some of the challenges and opportunities presented when trying to put together a system-wide eBook collection. A particular challenge she mentioned was restrictive licensing that makes it difficult to obtain access to certain kinds of content.

The next panel was moderated by Mitchell Davis and included Bob Holley (Wayne State University), Eleanor Cook (East Carolina University), and Leslie Lees (ebrary), who discussed “Finding Balance in Humanities and Social Sciences Acquisition.” Bob Holley began the session by again reiterating the vast numbers of self-published titles that are being produced each year. Bob’s remarks focused on academic subject matter that had niche interest, was highly collectable and important but hard to find in mainstream sources. An example he gave was the memoirs of Vietnam veterans. He outlined the advantages and disadvantages of going the self-publishing route for these kinds of scholarly works. He agreed that libraries to this point have not been able to easily identify these kinds of materials for acquisition. Eleanor Cook built her comments on Bob’s and agreed that, generally, academic libraries have ignored self-published materials except within the purview of special and regional collections. Within that area, self-published works are quite common and sought after, since most academic library materials are published in this fashion and they are a linchpin of regional collections. Another dilemma faced is when identifying faculty authors for local recognition. Many libraries hold such events and tend to recognize publications that are peer-reviewed and/or

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**Boot-strap Creativity**

Early Steampunk was much characterized by personal creation of gear and wardrobe to project the desired appearance.

http://www.instructables.com/id/Steampunk/ — All sorts of different creators from around the world display their work and give step-by-step instructions that the reader can follow to make their own Steampunk devices and accoutrements.

**Public Events Associated with Steampunk**

http://www.craftster.org/forum/index.php?action=tags;sa=showtopics;tag=steampunk — Craftster also has people posting their Steampunk creations with pictures and instructions.

http://www.anachrocon.com — Held in February in Atlanta, this is a gathering of around 1,000 Steampunk people, with informative panels and space to socialize in Steampunk fashion.

http://www.steampunkworldsfair.com — The World’s Fair, if it were Steampunk, which is held once a year in May in New Jersey.

**And Finally**

www.facebook.com/SteampunkSteam-punk.com — Amusing feed of Steampunk tidbits, memes, couture, hairstyles, on a social networking feed, to keep your Steampunk spirits up and protect you from the daily monotony.

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are published by established scholarly outlets. The definitions applied for such reward need to be broadened, considering the trends we are seeing in how scholars choose to publish their works. Both Holley and Cook agreed that library collection development policies need to include worthy self-published materials into the mix and that library vendors could contribute their expertise to assisting with identifying these materials up front. PDA plans may start including such materials if vendors can find a way to vet them. There are a number of alternative review sources that academic librarians could be perusing in order to find quality self- or independently published materials. ForeWord Reviews and similar should be considered for potential acquisitions. Perhaps a self-publishing approval plan could be developed.

Leslie Lees from ebrary suggests that suppliers of scholarly materials must embrace the entire ecosystem in order to find the best fits for libraries. Monographic publishing does not map well to serial publication trends. Peer review, grant funding, and scale are all totally different. She applauded initiatives such as those developed by various university presses as well as OAPEN, Knowledge Unlatched, and Palgrave/Wellcome Trust. She mentioned that her company is looking for ways to support open access publications.

William Gladstone was the final key note speaker of the preconference. Gladstone is a literary agent and a self-published author himself. He has worked with many notable authors and publishing projects and is a pioneer in the realms of print-on-demand and e-publishing. It would be safe to say he represents a visionary viewpoint. Gladstone was able to pull all the threads together from the other speakers of the day and wrap them up in a neat package of thought. He made sure we understood that publishing as we know it is going to change and must change. Roles are blurring. While mid-list authors have been cut out of the commercial cycle altogether in the past, no one today needs to feel left out of the loop. In an e-publishing world, self-publishing takes on a whole new dynamic. Libraries have an opportunity to expand their custodial role in a positive way. Gladstone left us hopeful and excited about what might happen next.

Throughout this preconference, Mitchell Davis was a present and supportive host. Although he didn’t actually present his own paper, his introductory remarks during the panels he moderated set the stage for what turned out to be an amazing half-day. We were able to glimpse at the future of publishing in a totally new light. I agreed to be a part of this preconference with very little knowledge of what I was getting myself into. I was both pleasantly surprised and impressed by the positive energy and progressive thinking I found in all the presenters. It has been several months since the conference and having finally come back to my notes in order to write this report, I find myself re-experiencing the excitement and wonder I felt while I participated. I sincerely hope that the information economy, “the power of libraries lies not in our passivity but in our action.”

Discovery or Displacement?: A Large Scale Longitudinal Study of the Effect of Discovery Systems on Online Journal Use — Presented by Michael Levine-Clark (University of Denver); Jason Price (SCELC); John McDonald (University of Southern California)

Reported by: Calida Barboza (Ithaca College) <cbarboza@ithaca.edu>

The researchers presented the results of their study of whether the implementation of a discovery tool impacts electronic journal use at academic institutions. The data show that there is variation by institution within each discovery service, that there is variation by publisher within each discovery service, and that some publishers experienced an overall net increase in use, while others saw a decrease. The data also show that discovery service and publisher as variables on their own were significant predictors of usage change and that interaction of discovery service and publisher was significant. The results reveal that discovery tools affect the use of different publishers’ content differently; no discovery service increased or decreased usage across all libraries or all publishers. The presenters’ future research will include a control group of libraries without discovery tools; institution size/enrollment profile as a factor; and it will account for aggregator full text availability, publisher size, journal substitutions, overall usage trends, and discovery tool configuration options. A follow-up presentation will be given at UKSG in April 2014.

Scholarly Societies, Scholarly Publishing, and the New Information Ecology — Presented by Robert Kieft, Moderator (Occidental College); Kathleen Fitzpatrick (Modern Language Association); Brandon Nordin (ACS Publications); Steven Wheatley (American Council of Learned Societies)

Reported by: Chris Diaz (University of Iowa Libraries) <christopher-diaz@uiowa.edu>

Open Access (OA) publishing and other forms of online scholarship are shaping the new information ecology. Nordin, Wheatley, and Fitzpatrick each took turns in providing updates on how their respective scholarly societies are addressing this movement toward openness. Nordin, Vice President of Sales, Marketing, and Digital Strategy at ACS, prefaced his statement by noting that, because scientific output is outpacing library budgets, the ACS is beginning to increase their OA options. This includes increasing their Hybrid OA options for their legacy journals, in which authors pay a fee to make their article OA in an otherwise non-OA journal, and launching a full OA journal in 2014, ACS Central Science. Wheatley, Vice President of ACLS, questioned the role of OA in the humanities given that subscriptions to small society journals are sustainably priced and relatively cheap. OA is only an answer for a scholarly society if the scholarly society can sustain itself with an OA model, said Wheatley. Fitzpatrick, Director of Scholarly Communication at MLA, revisited the purpose of scholarly societies, which was to facilitate communication within a discipline. As societies grew and the production of scholarly journals became more costly, societies turned to commercial publishers, who hold a different organizational mission. The Web was explicitly created for scholarly communication, Fitzpatrick noted. While the costs in producing scholarly works remain, the costs for reproducing those works continued on page 73
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have almost entirely diminished. The challenge is for societies to reconcile the value afforded by internet technologies with disciplinary customs. When questioned by the audience on why societies insist on continuing the print-production of journals, both Wheatley and Fitzpatrick noted the consistent demand from society members for print and that there are no plans from either organization to scale down this production.

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MORNING CONCURRENT SESSIONS 1

Doing More with Less: Exploring Batch Processing and Outsourcing in Academic Libraries — Presented by Jeffrey Daniels (Grand Valley State University); Patrick Roth (Grand Valley State University)

Reported by: Melody Dale (Serials Cataloger, Mississippi State University) <mdale@library.msstate.edu>

With the common problems of shrinking budgets and subsequent decreases in staff, Grand Valley State University (GVSU) aimed to find new ways of cost-effectiveness in their Technical Services department. Daniels and Roth discussed GVSU’s use of outsourcing and batch processing to more efficiently handle both print and electronic books. Vendor-provided marc records/uploads for e-journals were one method of outsourcing used by GVSU. While merely handling updates for their e-journals would have presumably taken one staff member around ten weeks (fifty work days), outsourcing significantly reduced that work load to around four hours per month. In addition to the outsourcing done by GVSU, a “batch weeding” project was performed which required only four hours for record maintenance and two hours to do a batch load to remove holdings, as opposed to the conjectured 240 work days it would have taken to do a traditional weeding project. While the speakers cited many benefits of outsourcing, they also discussed the importance of researching suppliers and mentioned one case in which records received were unsatisfactory and had to be re-cataloged. The session clearly highlighted the pros and cons of the methods used and the importance of weighing return on investment when making those decisions.

Herding E-Cats—Emerging Standards in Electronic Book and Journal Publishing and Management — Presented by Betty Landesman (University of Baltimore)

Reported by: Debra Hargett (Wingate University) <dhargett@wingate.edu>

Landesman opened the session by encouraging attendees to visit NISO (National Information Standards Organization) online to view the latest technical standards and applications related to e-resources. Her session was a springboard to encourage cognizance of current topics in standards and practices for information professionals. She gave an overview of acronyms and the alphabet soup of recommended practices, along with links for further explanation. In one instance, Landesman shared the Recommended Practices for Online Supplemental Journal Article Materials known as NISO-RP-15-2013. She provided a brief summary of why standardizing datasets and images in online journal articles is important. Because hosting content can mean dealing with the instability of an online repository, an author’s Website, or even a publisher’s partnership with an aggregator, this practice calls for the use of DOIs and persistent identifiers. Not only should this practice (when implemented) reduce the instances of broken links, it will increase the likelihood readers discover integral content associated with the supplemental material. After a series of examples related to KBART, DDA, PIE-J, and others, attendees were encouraged to share insightful tips and experiences for navigating the jungle of standardization. She concluded the session by reminding the group

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Let's Talk About Streaming: Providing the Resources that Faculty and Students Request — Presented by Jim Davis (Docuseek2); Christine Fischer (UNC Greensboro); Elizabeth Stanley (Bullfrog Films); Amanda Timolat (Baruch College, CUNY); Michael Waldman (Baruch College, CUNY)

Reported by: Roger Press (Academic Rights Press) <roger@academicrightspress.com>

Fischer indicated that Greensboro makes streaming files available showing both paid links and free resources. They have courses offered online — which created a problem if streaming video is not cleared for such usage. There is budget for video but it is hard to track and monitor rights — there is a low response rate from publishers. Therefore it is surprisingly difficult to spend the budget! The documentaries and educational videos are easier to clear than feature films.

Timolat mentioned that Baruch is one of the 21 CUNY Colleges, and students speak 110 different languages. Nine departments have purchased 50 Films, and they are mainly used by the Business school, Arts and Sciences. The DVD library has to be non-circulating to protect it. In 2009 Film Studies was launched as a program, and critical analysis of major films is required. Modern Languages and English also require film. The technical fee from students means a budget of $21,000 is available for film, but again there is a barrier locating rights. Pricing is also widely divergent, from $500 to $5k per title. Training faculty is the key — to clearly state their needs. Half the films are licensed directly from the producer/owner — the tracking is done through IMDB and the Perpetual licenses are easiest to administer but harder to negotiate.

Davis made a presentation about the Docuseek2 service. Interactive transcripts are searchable, which is a great feature. There is a change in the way video is consumed — so rights are available for 1 week, 1 year or 1-3 years. They are not selling trees but selling forests and need to conduct more research to work out whether this solves faculty needs.

Stanley described Bulldog Films. It has 900 environmental and social science videos and is the sole owner — simple to deal with. Their legal department is responsible and are a great source of content for a wide range of courses.

Summary: video is very much in demand, but there are not good sources although some are developing. The main barrier to increasing video resources is rights negotiation — even when there is a budget.

One IOTA at a Time: A Case Study of OpenURL Success Metrics — Presented by Adam Chandler (Cornell University); Aron Wolf (Serials Solutions)

Reported by: Calida Barboza (Ithaca College) <cbarboza@ithaca.edu>

In this session, Chandler provided a history of IOTA (Improving OpenURLs Through Analytics). He explained that wanting to identify the source of OpenURL problems and the desire to define a methodology to find solutions to those problems led to the creation of the initiative. Although the working group discovered a pattern to failures in OpenURLs, the IOTA study found that there is no objective cross-vendor metric to predict successful linking. As a result, Wolf tested the Serials Solutions link resolver 360 Link against itself. He ran a script to look into the raw HTML for a particular string of characters that indicated if the OpenURL linking had been successful. Wolf admitted that this is not perfect and doesn’t account for knowledge base inaccuracies. In the final analysis, the presenters stated that adding the OpenURL failures is a work in progress because publishers change things that will affect how OpenURL linking works.

Open Source Discovery Layers and the NextGen ILS: Collaboration, Integration, and Granularization — Presented by Ron Burns (EBSCO Information Services); Robert H. McDonald (Indiana University); Bob Persing (University of Pennsylvania)

Reported by: Georgia Briscoe (University of Colorado Law Library) <briscoe@colorado.edu>

This presentation was about Kuali OLE (Open Library Environment) which is the first extensible, quality, software designed to provide for academic and research libraries for managing and delivering intellectual information. This enterprise-ready, open source ILS expects to celebrate version 1.0 in San Diego on November 20, 2013, at the Kuali Days Conference. It is possible to download the source code and test drive the application from the Kuali Website now. The project has funding from the Mellon Foundation and contributions from many university partners. It is built, owned, and governed by Kuali member libraries.

The program included a history of Kuali from 2008, how the OLE service architecture works, and future plans for OLE. Originally, OLE did not plan for a discovery layer but now it has one built with Lucene/ Solr and Elasticsearch. Libraries which plan to implement OLE in 2014 are Chicago, Lehigh, and Bloomsbury Colleges; in 2015, implementation plans are at Duke, Indiana, North Carolina State, Maryland, Pennsylvania, and Villanova.

EBSCO Discovery Service (EDS) is a partner with some Kuali partners where easy-to-use plugins and modules for discovery are available. Other OLE partners use Viewfind, Blacklight, Moodie, or Drupal for home-grown discovery. University of Pennsylvania Kuali OLE Project Librarian, Persing, described their home-grown discovery layer, which can integrate data from OLE with other data sources, and its enhanced browsing functionality.
During this session, various providers discussed their current offerings to users and gave some insight into the future. They emphasized that platforms are constantly evolving to meet the needs of their audience. Some now permit purchasing only a single chapter and no longer require an entire book purchase, meeting the needs of their academic audience where professors might assign single chapters of pricey titles. Other innovations are being able to rent chapters and/or entire books versus purchasing.

The spread of mobile device use is being taken into consideration and platforms need to change so they’re viewable on all devices without impeding the flow of information. One solution is to design Websites that adapt to each device viewing the content rather than relying on native applications as there are too many devices.

Other new developments are the release of COUNTER4 and the use of ORCID. HTML and XML were compared for use in math texts; HTML5 show near print quality but people still want PDFs.

**The Social Side of Research and Opportunities for Librarians** — Presented by William Gunn (Mendeley, Inc.); Jeffrey Lancaster (Columbia University Libraries)

Reported by: Sharon Dyas-Correia (University of Toronto Libraries) — s.dyas.correia@utoronto.ca

Lancaster, Emerging Technologies Coordinator, Columbia University Libraries, began this well attended session by introducing himself and Gunn. Head of Academic Outreach, Mendeley, Inc. Lancaster indicated the focus of the session would be a consideration of how librarians can harness the power of social media tools in order to meet productivity needs of their researchers and help advance research workflow. He discussed how research is inherently social and indicated that the meaning of social for research can be collaboration, public engagement, the creation of a public persona or professional。

He pointed out that librarians can participate by identifying and facilitating communities, accessing and developing better workflow management for researchers, developing and supporting services around technology and facilitating collaborative engagement. Gunn presented perspectives on scholarly communication of early career academics and researchers, librarians and publishers and discussed how the social network provides opportunities for discovery and multiple relationships. He suggested that library technology is empowered by open access and that products like Mendeley are bringing tools and user experience from other parts of the Web to scholarly communication, building an open infrastructure and the products are therefore instrumental in enhancing the research workflow.

**Transforming a Print Collection** — Presented by Fred Rowland (Temple University Libraries); Ben Schoolar (Temple University Libraries)

Reported by: Derek Marshall (Coordinator of the Veterinary Medicine Library, Mississippi State University) — DMarshall@library.msstate.edu

With the planning stages of a new library underway, Temple University Libraries took a closer look at their print collection in order to better inform their purchasing decisions of eBooks as well as to determine which items to retain in a browsing collection. As the new library would house fewer materials to provide more study space for students, with many volumes stored in an offsite facility, Rowland and Schoolar looked for patterns in their circulation statistics to determine which items to move to storage and which items to retain in their browsing collection. By studying the circulation trends over a ten-year period, determinations were made at a department level. They found that a “broad brush can be too broad” as circulation statistics vary by narrower subjects within a department. Through the statistics gathered, Rowland and Schoolar were also able to determine that certain departments had a higher number of circulations relative to the age of the item. The presenters demonstrated their findings through numerous graphs and charts which showed that overall circulation of items assigned to a particular department is not necessarily reflective of the narrower subjects within that department.

**What Content, Where?: Selecting Course Content: Tools, Permissions, Analysis, and Where Librarians Fit In** — Presented by Joe Kelly (College of Charleston); Franny Lee (SIPX, Inc.); Bill Matthews (HighWire, Stanford University); James Newhard (College of Charleston)

Reported by Posie Aagard (University of Texas at San Antonio Libraries) — Posie.Aagaard@utsa.edu

The panel consisted of Kelly (Professor, Department of English, Senator for the School of Humanities and Social Sciences, College of Charleston), Newhard (Director of Archaeology, Associate Professor of Classics, College of Charleston), Lee (Vice President, University Relations / Product Development & Co-founder, SIPX, Inc.), and Matthews (Director of Business Development, HighWire, Stanford University) who served as moderator.

During the first part of the session, several key points about trends in faculty selection of content in their courses were discussed:

1. Traditional course readers have changed in the past years. Faculty members are seeking content in different ways.
2. For instructors choosing readings to assign at a college level, which tools are helpful to identify content?
3. How does copyright status fit into faculty members’ content selection decisions?

Both panel faculty members use traditional sources of content for their courses: textbooks and lecture content to establish knowledge and for the first article. Both faculty members allow their students to use digital materials, as long as they have the proper level of focus (e.g., are peer-reviewed).

The latter part of the session was a show-and-tell by SIPX (Stanford Intellectual Property Exchange), an online course materials platform designed to address copyright issues for materials selected for use in courses. SIPX has been used to provide PPV materials for online courses, including MOOCs. The system allows users to create “copyright-intelligent” URLs that allow faculty members to view metrics, such as per-student article analytics.

A quick overview of other available PPV and university-wide content options, such as the CCC’s Get It Now service, would have served as valuable context for the session. 😎

That’s all the reports we have room for in this issue. Watch for more reports from the 2013 Charleston Conference in upcoming issues of Against the Grain. Presentation material (PowerPoint slides, handouts) and taped session links from many of the 2013 sessions are available online. Visit the Conference Website at www.katina.info/conference. — KS
Blurring Lines — Bringing E-textbooks into the Orbit of University Library Purchase and Usage Preferences

Column Editor: David Parker (Managing Director, Alexander Street Press NYC; Phone: 201-673-8784) Follow me on Twitter @theblurringline

I entered the exhibit hall at the most recent ALA Midwinter conference in Philadelphia as I always do: on a mission to identify outliers. If you have been reading my column, you know that the outliers I seek are people and companies in the university library space doing the unexpected yet, in my opinion, predictive of the future. These trendsetters, if you will, are often engaged in “line blurring,” or moving from an expected activity into an unexpected activity. This year I was immediately struck by the increase in companies exhibiting with a decidedly learning-oriented business mission. Among these learning-oriented companies, the most surprising was an e-textbook publisher named Thuze. I spent the first nine years of my career in the textbook publishing business before moving six years ago into smaller companies dedicated to serving the library. Over the past six years I have attended more than 20 library-oriented conferences and I have never seen an exclusively textbook publisher in attendance … until Thuze. I will return to Thuze, but first I want to explain why textbook publishers are struggling and, specifically, why they have historically avoided the library side of the university with an institutional purchase model.

The textbook publishing industry was built on a deceptively simple business model that unraveled in the digital era: one student — one book. Professors make a textbook adoption decision and they generally stick with that decision for many, many years. Acquiring the professor/customer is time consuming and costly, but the pay-off is huge in terms of revenue generation over the subsequent years the textbook adoption is in place. The textbook is required for the course and the students historically had few, if any, alternatives. That is the way the business operated for many years until the Internet and the efficient markets and alternative textbook fulfillment businesses the Internet generated came to the fore. Students had always been able to sell their textbooks back to the college bookstore, but now they could participate in hyper-effective peer-to-peer reselling networks, rent print and digital textbooks from companies like Chegg, and find much lower-priced international editions online, and students and faculty began to discover that the publishers changes from edition to edition were generally modest and so older editions were effective.

Textbook publishers responded to the Internet and the power of the computer with relatively few meaningful innovations beyond the learning product itself. Algorithmically generated homework that was graded by software programs for problem-based courses like math and accounting was one powerful innovation that propped up the sale of textbooks by tying access to the online homework product to the purchase of the textbook via “bundling” of an access card to a textbook. Textbook publishers also introduced eBooks and even built an online store where all the major textbook publishers could sell their eBooks: CourseSmart (which was recently acquired by Ingram’s Vital Source). But the primary response to the various threats posed by Internet-based insurgents to the textbook publishers was to increase the price at which they introduced new editions, thus rendering the prior edition “useless” or unassignable by professors and to increase prices more often and at higher percentages than in the past. This, of course, created a vicious cycle of students seeking alternatives, thus reducing the number of books sold, and publishers responding with even more frequent revisions and price increases. The textbook publishers never seriously considered innovation in business models that would have changed the pricing, packaging or distribution strategy of one student — one book (or one access card); the only innovations have been in new products that are technology-based and produce “fully consumable” products that cannot be resold or re-used by students. The most recent version of new technology one sees across all the major textbook publishers is adaptive learning with digital products that “adapt” to the learning style and needs of the individual student and provide professors and administration with data for analytics to inform program and course modification. But Thuze has taken a different approach, tackling business model innovation through a wholly new distribution and pricing strategy.

Thuze began five plus years back not as a commercially-oriented enterprise but as an internal entity within Bridgeport Education that sought to provide high quality e-textbooks to Bridgeport’s students at Ashford University and The University of the Rockies. The aforementioned practices of the major textbook publishers, namely too frequent and non-substantive revisions and regular and steep price increases, led Bridgeport to embark on a textbook development and publishing program. Bridgeport hired a team of publishers from the major textbook companies and implemented a book development process based on the same quality practices of companies like Pearson Education and Cengage. But the focus was squarely on producing high quality, no-frills e-textbooks with a proven level of interactivity and not speculative and expensive ventures into multi-media. And, importantly, the editorial team at Bridgeport signed respected authors willing to write books for a fee rather than a royalty.

In 2012, Bridgeport Education launched the Thuze imprint to take its catalog of 100+ e-textbooks out to the wider world. According to Andrew McCann, who leads sales and marketing for the Bridgepoint Education Products Group, “university libraries and other institutions can license the entire library of Thuze e-textbooks for a single low fee, and either offer textbooks for free in many high-enrollment courses or implement a modest course fee to recover the cost of the program.” The Thuze catalog offers titles for many of the major introductory courses across the university, ranging from business to science and the arts. Each title is delivered DRM-free for $35.00 to the student and includes a variety of useful interactive features like quizzing that links the reader back to the appropriate section for review if they get an incorrect answer. Thuze has seen adoptions of its books at more than 60 universities including The College of Charleston, University of Alberta and Ithaca College. Classroom adoption by individual professor is important to Thuze, but the real opportunity the team at Thuze sees is in institutional sales, including through the university library.

Unrestricted access eBooks for scholarly use available through the university library are on the increase but DRM remains the norm. And, often, when the DRM is removed it is on the back list of lower-use titles. The company I founded, Business Expert Press, focused on delivering unrestricted access eBook collections to the university library as soon as published, but our books were aimed at niche, advanced business courses and for reference use by advanced business students in MBA and executive education programs. Thuze is offering the same unrestricted access, DRM-free policies but for titles with much wider appeal and application in introductory courses across the university curriculum. It is a bold but timely bet and one to watch closely as it will raise the stakes for the large textbook publishers should the Thuze model take off with university libraries and university faculty more generally.

I have written in the past about the need for eBook publishers to function more like journal publishers as concerns access and usage rights and for journal publishers to function more like eBook publishers as concerns purchase models. Thuze has “fused” the best of access and usage with purchase policies for potentially very high use content that will lower costs for students and families and allow the library to be a hub for course-critical learning content.

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<http://www.against-the-grain.com>
The winter of 2014 in the Lowcountry has been a little icy. So on a recent sunny, warm Sunday afternoon the pull to be outside embracing the invigorating climate was too strong. A walk along upper King Street always means a stop at Blue Bicycle Books. Bookstores and libraries are hard for me to resist. While there, my husband discovered a paperback version of A Game of Thrones by George R. R. Martin, which he decided to purchase because of the modern hype surrounding this title. When he paid the storekeeper, she commented: “Don’t judge a book by its movie.” What a fascinating comment.

In 1965 the British film Doctor Zhivago premiered. This epic dramatic/romantic film based on the story line of Boris Pasternak’s book by the same title was a must see. The book was directed by David Lean, produced by Carlo Ponti, and filmed mainly on location in Spain since the book had not been published in Russia at this time. It would be 1988 before the Russians saw the book on their shelves. The film and the novel were sweeping successes in the West. Although the film received mixed reviews, the novel received numerous literary merits. Cue the comment: “Don’t judge a book by its movie.”

I have seen the film, lost myself in the film score, and read some of the book. One might venture to say Pasternak used many of his own life’s events to construct this epic dramatic/romantic tale of his only novel set during the time of the revolution. My choice for discussion of Pasternak’s work, however, is a short story entitled Il Tratto de Apelle that he composed in 1915 around the time of his visit to Italy.

First a little bio. Pasternak was born in Moscow in 1890 of Jewish heritage. The son of talented parents, his father was a professor at the Moscow School of Painting, Sculpture, and Architecture and his mother was a concert pianist, he initially felt the pull toward musical composition. A brief time of philosophical study in Germany with a side trip to Italy set him on another path — one of writing. He had set a new standard for Russian poetry. But the politics of Russia took a decided influence on his work and The Second Birth collection of 1921 Pasternak had set a new standard for Russian poetry. But the politics of Russia took a decided influence on his work and The Second Birth collection of 1921 received mixed reviews. Acceptable to the Soviet public, unacceptable to the anti-communist emigres.

In the end Pasternak was loved by his countrymen for his poetry, respected for his amazing translations of classics including Shakespeare, and swept into a political whirlwind caused by the overwhelming international popularity of Doctor Zhivago.

When Pasternak was awarded the Nobel Prize for Literature in 1958 he was “immensely thankful, touched, proud, astonished, abashed.” The award came on the heels of the publication of Doctor Zhivago by the Italian publisher Giangiacomo Feltrinelli. Since the publication had been denied in his homeland the thought was such a prestigious award would bring insult to the government, and he was forced to leave Russia or to decline acceptance. He penned to Khrushchev: “Leaving the Motherland will equal death for me. I am tied to Russia by birth, by life and work.” He also sent a telegram to the Swedish Academy: “Considering the meaning this award has been given in the society to which I belong, I must refuse it. Please do not take offense at my voluntary rejection.” (Lyrical even in his declination.) To which the Nobel Committee replied: “This refusal, of course, in no way alters the validity of the award. There remains only for the Academy, however, to announce with regret that the presentation of the Prize cannot take place.”

Now to a short story. It is of constant curiosity to me how I come to find certain Nobel literature. With Pasternak I would be hard-pressed to find an individual who does not have some knowledge of Doctor Zhivago. But in my little gem of a used book entitled Great Stories by Nobel Prize Winners is Il Tratto de Apelle, a short story by him. I read the 23-page story and then reread it after researching Pasternak’s life for this column. I am glad, because as I absorbed his words I believe I could feel his artistic conflict, his transition from music to writing, the impact of a short academic time in the realm of philosophy, and this new poetic lyric wording leaping from his pen as he wrote a short tale based on his visit to Italy. I will share two passages. Decide for yourself.

“The leaning tower of Pisa had pushed its way through a chain of medieval fortifications. The number of people who could see it from the bridge were increasing every minute. The red glow of the sky, like a pursuivant, crawled along the square. The streets were blocked with tiptilted shadows, some of which were still fighting in the narrow alleyways. The tower of Pisa continued its march, moving everything down, until at last one insane, gigantic shadow covered the sun. The day broke into pieces. And meanwhile the lackey, briefly and confusedly informing Heine of his recent visit, succeeded several moments before the final setting of the sun in presenting the impatient guest with a car [sic-card] bearing a coagulating yellow stain.”

“A seat by the window. A moment later — an entirely deserted platform formed a massive...
When I started writing books nearly fifty years ago, I had an idea about the end result of what I was doing. That first book was a short monograph, Temperature Control, which Wiley published in 1968. I thought it would remain on library shelves for many years. Why not? After all, a decade earlier I'd had a student job in the MIT library, and weren't the basement stacks full of old books, among other materials? Just to further entice me, the reception area at Wiley's offices on Third Avenue in Manhattan was wood-paneled and lined with shelf after shelf of books whose ranks I yearned to join. (To this point, no surprise, my dream is reality. According to WorldCat, for instance, half a dozen research libraries within a short drive from my Upstate New York home have a copy.)

My thinking was reinforced twenty years later, when I edited the first of my twenty or so engineering handbooks. That was in 1986, when Wiley published the first edition of the Mechanical Engineers' Handbook with my name on the spine. I had the idea that the handbook would have a long shelf life, and in some future edition, would live on long after I was gone. Again, why not? The main competitor (although it focuses on fundamentals, while mine focuses more on new practices) was the ubiquitous Marks' handbook, which was still going strong three decades after the death of Lionel Simeon Marks. (Marks was born in Birmingham, England in 1871 and died of a heart attack in Providence, RI in 1955. According to Wikipedia (Sorry!), he held a mechanical engineering professorship at Harvard for over four decades, starting in his early twenties, and also taught at MIT in the early 1900s.) The Marks' Standard Handbook for Mechanical Engineers was first published in 1942 and has been reprinted and updated countless times since then.

Actually, Marks started as a competitor to an older Wiley handbook — Kent's Mechanical Engineers' Handbook, which was first published in 1895. William Kent (1851-1918) was the founder. Handbook dimensions were pocket-sized. Kent's original title was Mechanical Engineer's Pocket-Book: A reference-book of rules, tables, data, and formulae, for the use of engineers, mechanics, and students. At the outset, new editions came much more rapidly than they do now. The eighth edition was published in 1910, only fifteen years after the first. Kent's son, Robert Thurston Kent, born in 1880, took over at some point in the early 1900s and new editions came more slowly. Trim dimensions had grown bigger. Eventually, others edited the handbook, but as was the case with Marks, Kent's name remained in the title. The 12th edition was published in 1950, more than a decade after Kent had split into two volumes. In the 11th edition, published in 1936, the first volume was called Design, Shop Practice and the second volume Power. In the next edition, the first volume title was changed to the more professional and academic sounding Design and Production. It was edited by Colin Carmichael, who also edited a book on electric motors. The Power volume was edited by J. Kenneth Salisbury, an expert on steam turbines. Like early editions of Marks, Kent was bound in faux leather. Someone gave me a copy of one of the volumes as a going-away gift when I left a drafting job at the Portsmouth Navy Yard and went back to MIT for my sophomore year. (I got the job by acing an easy civil service exam.)

That 12th edition was Kent's last. The base of Wiley's engineering handbook program was tiny (four or five titles in all), particularly compared with McGraw-Hill's, and nothing was done with the program until the late 1970s, when a former McGraw-Hill executive was hired to revive it. When I signed on to edit a mechanical engineers' handbook, I thought that Wiley would keep Kent's name in the title, but they had no intention of doing so. I wanted to make a fresh start as well, and it seemed a no-brainer to jettison much of Kent's pages like, for instance, tables with numerical values that engineers could easily call up on the Texas Instrument pocket calculators that were so popular at the time. In the end, contributors used almost nothing from the old book in my new one. Besides, by then it was three decades since the last publication of Kent. So Wiley's decision made a lot of sense.

Yet Kent's name has by no means disappeared. You can still find copies of some editions of his handbook (he published several other books) on Amazon, Ebay, Abebooks, and Alibris, among other places, mostly for a few dollars, although in some cases at collectors' prices. I'm not sure, however, even given considerable time, that you would be able to put together a collectable set of your own of all the Kent editions. Of course, numerous state and academic libraries have various editions in their physical-copy collections. The book has been digitized, and you can peruse the contents of some pre-1923 editions. So Kent, in one edition or another, appears destined for perpetual life, albeit in a vegetative state impervious to the ministrations of editors.

In my view research libraries are keeping their physical and digital copies of Kent as historical artifacts. The situation with Marks appears to be far more preferable — although I don't know McGraw-Hill's plans for it. In any case, Marks appears to be a living organism with body parts (chapters) that editors and contributors can fix as they see fit. They can keep the handbook roughly the same size or they can expand it into a multi-volume work. Whatever the decision, Marks has its place on the shelves of research libraries.

Until recently, I'd thought the same about my own Mechanical Engineers' Handbook, which is published in four volumes, to take into account the growing breadth of the discipline. The fourth edition is in production, with publication due at the end of this year. I hope to be around for several more editions. I also hope that Wiley will see fit to keep the Handbook alive and will keep my name in the title or at least on the cover or title pages of future editions that other editors will deal with. But now that research libraries are increasingly buying published materials in digital format, is it safe to assume that future editions of my handbook will reside in those libraries in one form or another? Handbook publishers — commercial houses, pretty much — rightly in business terms and in theinterest of shareholders, will focus on whatever deals they can make that maximize the bottom line. Of course, publishers and libraries do have a, should I say, contentious partnership. For example, publishers are making complete archives of scholarly journals available to libraries as a benefit to patron researchers. Perhaps handbooks in multiple editions will be treated the same way. I can only hope that the promise of pride I felt when I first entered the book-lined reception area at Wiley so long ago, and my hope for longevity of my books, will not be lost.

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Booklover from page 77

stone, massive rumbling sounds and massive exhortation from the guard: Pronti! — and the guard runs alongside in pursuit of his own exhortations. The columns of the station slip smoothly away. Lights scurry along, intermingling like knitting needles. Gleams of light from the reflectors catch the carriage windows, caught by the draught, proceed through, beyond and across the opposite windows, lie along the line, trailing, slide on the rails, rise beyond and across the opposite windows, lie caught by the draught, proceed through, beyond and across the opposite windows, lie caught by the draught, proceed through, be-
Among historically black colleges and universities, Tennessee State University holds the distinction of having several Olympic track gold medalists, like Wilma Rudolph and Ralph Boston, and outstanding football players like Ed “Too Tall” Jones, and NFL stars like Joe Gilliam, Jr. and Richard Dent. We also have famous alumni like Oprah Winfrey, gospel music legend Dr. Bobby Jones, and actor Moses Gunn, who is one of the founders of the Negro Ensemble Company as well as scientists like Jesse E. Russell and Dr. Levi Watkins, inventor of the Automatic Implantable Defibrillator (AID).

In 1976 the library made the decision to create a Special Collections Department that would house and preserve the accomplishments of some of its illustrious graduates, and the publications of its faculty, as well as African American history in Nashville and Tennessee. The department also keeps records on the history of the university, including yearbooks and traditional celebrations, such as Homecoming. Along the way, the decision was made to send all books written by and about African American authors to Special Collections. Founded in 1912 as Tennessee Agricultural and Industrial Normal School, the university has some genuinely rare titles written by and about Black Americans. In the 1970s, the Acquisitions Librarian decided that when new African American Studies purchases were made, one copy would go to the Circulation or Reference, and one copy would go to Special Collections. The thinking was that if the Circulation copy was unavailable, the patron would still have access to a copy of the book.

As time went on, the publishing of books by and about African Americans became more abundant, while the number of degree programs offered by the university continued to grow. About eight years ago, the book budget got to the point where it could no longer support the purchase of two copies of each title, so the one copy that was bought went to Special Collections, where it did not circulate. The department is not open Monday-Friday after 4:45 PM and is closed during weekends. This meant that the researchers in African American History and Africana Studies had very limited access to any of their students. The former department head for Africana Studies use to complain about this to anyone who could hear him, whenever he got the chance. Moreover, in 1997 the Special Collections Librarian decided to let the Head of Cataloging determine what would be sent to the department. Cataloging sent most of the books about African Americans to Special Collections and the space began to burgeon with the books by and about African Americans in all genres, including children’s books and light fiction. This situation made it increasingly difficult to house actual archival materials in the area. Those resources went into rooms that were originally meant for quiet study spaces and were sometimes stored on book carts.

The problem reached a turning point one day when I was the ranking librarian in the building and a student insisted he wanted to browse the collection and the Special Collections Librarian took the position that Archival and Special Collections areas did not have resources that permitted browsing. Her position was not stated in the Collection Development Policy or posted in anywhere in the Special Collections area at the time, but her point of view prevailed. The confrontation between the Department Head and the student was unpleasant and I thought unfair.

While it may be true that Archival and Special Collections areas are not for browsing, from the Collection Management point of view, I felt that the majority of books on her shelves could not be considered archival material or rare books. The Head of Special Collections subsequently agreed with me on that point and she also felt that she was running out of room to house more books. After much back-and-forth between Collection Management, Special Collections, the Assistant Director for Public Services, and the Library Dean, it was decided that the non-Special Collection books would be transferred into Circulation and Reference or other more appropriate areas or withdrawn from the collection. The Systems Librarian ran a report that showed this might involve over 5,000 books.

Fortunately the Head of Special Collections and I were on the same page about transferring the books, however, when I called a meeting to map out a procedure, we discovered to our dismay that our colleagues in Circulation and Reference did not share our enthusiasm. A sizable portion of the books to be transferred were in African American History, which meant that the E section, which was already tight, would have to be shifted as well. The Circulation Supervisor argued that there wasn’t enough room to shift and accommodate the transfer of books from Special Collections. This was not quite accurate, because I had weeded the A-D, four or five years ago, so Circulation, which is not accurate, because I had weeded the A-D, four or five years ago, so Circulation, which is not understaffed, just needed to shift backwards. She also thought that if we took the books out of Circulation, they might get lost or stolen and be too costly to replace. The Head of Reference desired to have the status quo. He wanted us to leave the books where they were, until we weeded not only the first floor, but also the third floor which held the other half of the collection. I would like to say that the meeting ended on a congenial note with all hearts in agreement, but that did not happen.

After a week or so of fuming, I latched on to something the Head of Reference had said in the meeting. He said that library needed to be weeded and nobody had objected. If I removed books from the E and F section, wasn’t that weeding? If Special Collections pulled the books that did not reflect her Collection Policy, wasn’t that weeding? I decided to remove the word “transfer” from my description of the project and relabeled it a “weeding project.”

To test the waters, I decided to do what I called “stealth weeding” of the E section. I would wander out and return with my arms full of books, which I would load on a cart. I told the Special Collections Librarian I was going to proceed with the weeding project until somebody told me to stop. The Head of Cataloging said she would process whatever we brought her. Soon I got emboldened enough to take a cart out to the section and started weeding in earnest. Library staff entered and exited the building from our floor and nobody said anything about the carts of Special Collections books, so the project picked up steam and started going full force.

We began the “Special Collections Weeding Project” by working with the Systems Librarian’s report on the items assigned to the Special Collections location. We decided that books by and about African Americans in Tennessee, books by and about famous alumni, books written by past and present faculty members and alumni, and any publication about the university would be remain in Special Collections. In addition, we would also keep autographed copies of books donated by celebrities and lecturers who visited the campus. These titles were the most demanded by patrons who visited the department.

During the first round of weeding, I went through the list and highlighted duplicates, including books that we had both in print and electronic format and children’s books. Most of the biographies of famous African Americans like Harriet Tubman, W.E.B. DuBois, and Martin Luther King, Jr., were in the Special Collections Department, so I flagged some of them for Circulation. Literary criticisms on authors like Toni Morrison, Alice Walker, and James Baldwin, which were never meant to go to Special Collections, were made available for the students to check out. When
I finished with the list, I gave it to the Special Collections Librarian for review and she turned those books and others she thought should be transferred downward on the shelves, so that they would be easy to identify. The Senior Library Assistant in Collection Management agreed to remove the books from the shelves, but before she took them to cataloging, she verified them against the list created by the Systems Librarian. Although the area had been inventoried about three years ago, there were still items on the shelves that did not appear on the pull list.

As we got further along in the project, the Head of Special Collections became a woman possessed. She could not weed enough books! After the first round, she requested that I come up to the area for an evaluation. We did a walkthrough of every shelf, and agreed on additional titles that were more aptly suited for other areas of the library. We did a second and third round where we weeded the science, photography, literature, performing arts, religion, sociology, psychology, business, criminal justice, and political science books.

When the dust settled, and there were many, many dusty books on those shelves, we had actually transferred 3,900 books, which went to Circulation, Reference, the Youth Collection, and the library on our Avon Williams Campus. Since I had made the effort to weed the E, F, and G sections before the transferred books started coming out of Cataloging, the Circulation Supervisor and the Stack Supervisor said nothing to me about not having space to shelve them. The Special Collections Librarian was able to bring some of her most popularly requested items out of the storage rooms and on to the shelves in her area.

This project was not successful just because we changed the semantics. All of the concerns of the stakeholders were taken into consideration and systematically addressed. Since this is my seventeenth year at the library, I think I have a pretty good feel for the motives and attitudes of the personalities involved, as well as a history of how past library projects had gone from air travel to space travel. With cloud computing, to online journals it was like going from train communication. When we went from print-six o’clock news. Now, it is Twitter Trends. And some of these are both, such as the rise of open data and open access publishing.

— cloud computing and smartphone apps. A similar acceleration is going on in scholarly communication. When we went from print to online journals it was like going from train travel to air travel. With cloud computing, smartphones, open data, social media and all of the other new ways of interoperating, we have gone from air travel to space travel.

When there were only print journals, managing your collection was much simpler; you knew what you subscribed to, who checked it out, and who requested new journals. When journals moved online, the world became more complicated. Often, the journals were part of databases and the databases came from several vendors who all had their own way — or no way — of reporting usage to you. In 2002, an initiative known as COUNTER (Counting Online Usage of Networked Electronic Resources) formed to standardize library usage statistics. Librarians, publishers, and intermediaries cooperated with this initiative and created standard ways of reporting usage. Now, over ten years later, COUNTER statistics are still a good tool to assist librarians in managing their collections.

Citation counts are another set of statistics important to research and researchers, and hence by extension librarians making collection decisions. In the 1960s, publishers and others developed a methodology that determined the impact of research based upon article citation counts. From this approach came many statistics, the most popular being Thomson’s Journal Impact Factor or JIF. There are many complaints about statistics based upon citations, including self-citation and superfluous citations. However, the biggest problem in using JIF and others is that in today’s research landscape they are lagging indicators.

The world keeps changing. Over a decade ago, the great shift from print to online had been going on for some years and everyone was getting comfortable managing and purchasing online content. Now, there are other new great shifts happening. Some of these are technical — cloud computing and smartphone apps. Some of these are social and cultural — mandates for open data and open access publishing. And some of these are both, such as the rise of social media. You used to figure out what was significant in the world by reading newspaper headlines or listening to the top stories on the six o’clock news. Now, it is Twitter Trends. A similar acceleration is going on in scholarly communication. When we went from print to online journals it was like going from train travel to air travel. With cloud computing, smartphones, open data, social media and all of the other new ways of interoperaing, we have gone from air travel to space travel.

In this accelerated age, it is still important to understand how your institution uses your collection, and COUNTER statistics are still good for this. However, now it is also important to understand how the world uses your institution’s research. Citation-based statistics are not the way to determine this. According to Brody and Harnad (2005), it takes five years for a paper in physics to receive half of the cited-by references that the article will ever acquire. If you want to keep pace with your researchers, you cannot make collection decisions based on five-year old information.

With so much interaction between scientists and researchers, you do not want your library left behind wondering what is happening.

Alternative metrics, also known as altmetrics, is a new and modern way to assess research impact that takes into account all of the ways individuals interact with research apart from citation counts. Full altmetrics looks at research artifacts beyond articles and tracks things like presentation slides, datasets, videos, books and book chapters, and figures, to name a few. Then, full altmetrics tracks many metrics about these artifacts including downloads, views, bookmarks, tweets, book holdings, ILL requests, and more. It is by looking at all of this data that you start to get an accurate picture of research impact and an understanding of what the researchers at your institution need.

Looking at alternative metrics can help your collection. By knowing in which journals your faculty publishes, you can ensure that you subscribe to these journals. Not only will your faculty be appreciative of this, but also your students will have access to research that is important to your institution. In addition, you will have a better understanding of the usage and other categories of metrics about your resources beyond your own institution’s COUNTER statistics.

The Changing Nature of Collection Development

According to an ARL Issue Brief:

Twentieth-century research library collections were defined by local holdings, hailed as distinctive and vast. Twenty-first-century research library collections demand multiple strategies.

continued on page 81
for ensuring broad access. Never before have we been required to grasp so many dimensions of research in order to make wise decisions. In a networked world, local collections as ends in themselves make learning fragmentary and incomplete. (ARL, 2012).

Your library collection is much more than the electronic resources you purchase. As a librarian, you also take great care to highlight other important resources. You do this by carefully creating LibGuides and other Web pages, teaching information literacy classes, performing as liaisons to the researchers, conferring at the reference desk, and other ways of interacting with students and faculty. In ARL’s 2013 report “Transforming Liaison Roles in Research Libraries,” they argue that changing technologies, more digital information in more formats, changing research methods, and new practices of how scholars communicate and disseminate their creative work, demand that librarians’ roles in collection development and in other areas need to evolve, too.

To be conversant in the disciplines that are important to your institution and the research they are conducting, you need to know what the world is consuming in those disciplines. Which journals are your faculty publishing in? Should they be considering Open Access journals more now than they have in the past? Why? Is your institution developing data hosting and archiving for your researchers? Are there Institutional Repositories that contain articles your faculty has published? What presentations have your faculty given that are grabbing attention around the globe? What research is your faculty paying attention to? As you can see, there are a myriad of questions that you can answer that help inform your collection decisions that could improve the resources you provide to your library constituents.

Expanding Role for Librarians

Librarianship does not start and end with providing good collections, pointing individuals to the correct resources, and answering questions. Librarians have the opportunity to participate in their institution’s research process in a valuable way.

According to the Registry of Open Access Repositories Mandatory Archiving Policies (ROARMAP), by the end of 2013 over 240 universities and over 90 research funders had adopted open publishing mandates. Just ten years ago, these mandates were practically non-existent; they have been growing rapidly year over year. In many institutions, libraries and librarians play a major role in creating, maintaining, publishing, and promoting their institution’s open repositories. By using altmetrics with your open repositories and publishing initiatives, you can provide the authors and faculty with metrics about their articles, papers, data, and other research artifacts. While the mandates to publish are a “stick” approach to getting your faculty to use your Institutional Repository, you can use metric information to deploy a “carrot” approach to inform them how the use of your Institutional Repository has helped the spread of their research.

Researchers want their work to be shared, discussed, and applied. It is difficult to objectively know if their research is having an impact. By using altmetrics, librarians have another positive way of helping the researchers on their faculty. Librarians can provide author profiles and reports of how their research artifacts are utilized in many areas such as downloads, bookmarks, tweets, blogs, and citations. This service has the potential to elevate librarians and their role in the minds of the faculty. In turn, librarians can assist the faculty in understanding some of the best places to publish and promote their work.

It has long been the role of librarians to assist in determining research impact. Over the years, this role diminished as the reliance on purchased tools such as Web of Science and Scopus became popular. However, as this article states, research impact is more than statistics based on citation counts, and indeed is more than research articles. To appreciate impact it is important to understand how the world is interacting with research artifacts across the five categories of metrics. These are 1) Usage, e.g., downloads, 2) Captures, e.g., bookmarks, 3) Mentions, e.g., blogs, 4) Social Media, e.g., tweets, and 5) Citations, e.g., Scopus. By looking at impact information across these categories, you can become a well-versed partner to your faculty and your institution by stepping into the position of understanding and assessing research impact.

The Bottom Line

Alternative metrics is a new and growing field. Thus, using them in librarianship is also very new. This represents a huge opportunity for librarians. By bringing altmetrics into their libraries and institutions, librarians can play a larger role in the research process. Altmetrics can help librarians make important collection decisions regarding which electronic resources to purchase and which other resources to highlight. Librarians can use altmetrics to assist faculty in understanding the scholarly communication landscape, promoting faculty research and highlighting emerging scholarly fields while providing leading edge metrics that represent the most current interpretations of research.

References


Changing Library Operations — Multiyear Analysis of Library Operations

Column Editors: Allen McKiel (Dean of Library Services, Western Oregon University) <mckiela@wou.edu> and Jim Dooley (Head of Collection Services, University of California, Merced) <jdooley@ucmerced.edu>

This is a small case study analysis of the changes in library operations at Western Oregon University (WOU) over the past six to eight years. WOU is a medium-sized (6k students) master’s level public university about 10 miles southwest of Salem, Oregon. The study focuses on shifts in resource expenditures, holdings, usage, cost per use, and gate count. It also looks at changes in operations and personnel.

Resource Expenditure Shift to Online
Electronic resource expenditures have eclipsed print over the past eight years. Electronic resources comprised 23% of expenditures in FY06. By FY13, online resources consumed 84% of the resource budget (see Graphic 1 — Print and Electronic Resource Expenditures FY06 - 13). Over the eight years, the total information resource budget declined by 5%.

Books and Serials Expenditures
E-journal expenditures have become dominant over the past eight years. In FY06, print journals comprised 43% of expenditures, print books 32%, e-journals comprised 24%, and e-books only 1%. By FY13, e-journals consumed 69% of the resource budget. E-books claimed 8%, print books 9%, and print journals 5%.

Cancelation of individual subscriptions to both print and e-journals and decreased print book purchases funded the increased electronic expansion. The transition was afforded by reduced book allocations and cancellations of individual print and electronic journal titles in favor of databases of e-book and journal titles, pay-per-view access, and PDA. Print journal titles were cancelled in favor of the least expensive way to replace it in e-format. We would also cancel e-journal subscriptions if annual usage costs via pay-per-view were lower than the e-subscription cost for a title. (see Graphic 2 — Print and Electronic Books and Serials Expenditure Trends Detail FY06 - 13).

‘Holdings’
We have aggressively pursued an access rather than a holding strategy for collection development. Subscription databases, PDA, and pay-per-view permit relatively inexpensive expansion of titles. The approach increases the probability that a search term will find matches and permits access to content that we could not otherwise afford. The cost per title for access to e-journals between FY08 and FY13 averaged $20.17 per unduplicated title. For the same time period, access to e-journal titles increased by 72% from 11,595 to 95,941 unique titles. E-book titles increased by 133% — from 42,000 to 98,870 at an average cost of $3.56 per title. Print book titles purchased or received as gifts in the conventional manner increased the collection by 6% — from 213,717 to 226,322 volumes and cost (with gift titles included in the calculation) on average $36.47 (see Graphic 3 — Book Volumes, E-book Title, and PT E-journal Access FY08 - 13). The average cost per title excluding gifts was just over $80 in FY13.

Total Usage
Total physical circulation and online usage increased by 59% over the past 7 years from 148,401 to 235,007. Total physical circulation decreased by 19% — from 63,779 to 52,154. Total full-text online usage has increased by 116% — from 84,622 to 182,853 (see Graphic 4 — Physical Circulation vs. Online Usage).

Physical Item Usage
Overall, circulation declined by 14.5% for physical items. Book usage was up while print reserves, equipment, and AV were down. Circulation of print books decreased just over 9% from FY08 through FY12, an average of about 2% per year. It increased by nearly 18% from FY12 to FY13 for a net gain over the six years of nearly 8%. An explanation for the sudden increase has not yet become apparent.

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borrowing through the 37 libraries of the **Orbis Cascade Alliance** saw an increase of 2.2%.

Physical reserves and AV checkout dropped by 22.3% and 20.8% respectively with equipment checkout dropping 72% (see Graphic 5 — Physical Item Usage 2008 - 13). [We are no longer checking out laptops.] With the exception of the anomalous FY13 year, book usage has been steady with about 2% of the usage shifting to **Alliance** books. Physical reserves has shifted to e-reserves using Moodle instead of the library. AV is moving to streaming.

**Online Usage**

Library provided e-journal usage (i.e., not counting open Web access) was already established by FY08 as dominant over print journals. Nevertheless, usage rose 37.8% by FY13 at nearly 90% of e-resource usage. E-book usage has been slow to develop when looking at the usage relative to holdings. In FY08 e-books were 16% of the total book collection and only 6% of the usage. By FY13 e-books were 30% of the total book collection and 27% of the usage. There is still a preference for print books but it is now marginal. Convenience and comfort of format matters to faculty and students; and e-book formats seem to have become familiar and tolerable enough at this point to have near parity in usage relative to their portion of the collection (see Graphic 6 — Library Database Usage FY 08 - 13).

**Cost Per Use**

The increased volume of resources for approximately the same expenditure from FY07 to FY13 paralleled increased usage which resulted in a lower cost per use. The expanded portion of print books had an average cost per use of $55.58 [calculated as a percent of total usage proportional to its percent of the total collection]. The cost per use of e-books was $4.82 and e-journals $1.85 (see Graphic 7 — Book, E-book and FT E-journal Average Cost per Use between FY08 - FY13).

**Gate Count**

Gate count more than doubled from 222,334 in FY00 to 461,800 in FY01 when we opened the new library. The increased gate count was primarily from the enthusiasm of the new and attractive space on campus. Gate count decreased by 44% from FY01 to FY07 then stabilized. The decline from FY01 to FY07 was likely due primarily to the gradual loss of the newness of the building. Availability of online resources increased dramatically after 2006, which is when the usage of the building stabilized (see Graphic 8 — Gate Count).

The point worth noting is that the gate count has not decreased during the rapid transition to online usage. In FY00, resource usage was nearly completely physical. By FY13 total physical resource usage had declined to 21%. Print book usage garnered 12% and print journal usage less than 1% of total informational and equipment resource usage.

The point is further accentuated when considered in light of the increased usage by students and faculty of open Web resources. Students, in a recent **Credo** survey of student information resource usage, reported that the open web was their primary resource for assignments *(ATG, April 2013)*. Almost 70% of the students reported using open web resources regularly and only 46% said they used library resources regularly. Given that our usage of physical resources is 21.7% of usage compared to e-resources combined with usage reports from students that they use library resources less than half as often as open Web resources, they are using physical library resources for only about 10% of their academic information needs. Students do not come to the library for physical resource usage other than the furniture, online access, and space. They need a place to be where they can study and work on assignments and there is access to the Internet. Given our social nature, they may also prefer a place where they are not alone.

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*continued on page 84*
Operational and Personnel Shifts
From Tech Services to Systems, Archives, IR, and Digital Commons

The shift from print collection building to online access decreased personnel needs for book processing and cataloging. The number of titles decreased but we also outsourced book processing and most of the remaining cataloging. Our technical services librarian retired in 2010. Rather than hire another technical services librarian, we hired our first archivist who was willing to manage three enterprises: a scaled down version of tech services, developing and processing our archives collections, and initiating the implementation of Western’s Digital Commons. In hindsight, this was very cruel. The range of responsibilities was completely unrealistic. A bit of relief came from the collection development/systems librarian who agreed to assume responsibilities for technical services. We expect that the digital publishing role of the library will be on the ascendency over the next decade and electronic and physical archives will become the primary focus of collection building that could be considered ownership and unique to Western.

The downsizing of technical services provided a fair amount of trauma for the staff positions because of the ensuing fluidity and uncertainty of job descriptions. One staff member is left. We are currently beginning the process of implementing the Orbis Cascade Alliance shared Ex Libris integrated library system and expect that over the next year the technical services and systems workload will be fairly consuming for many of the librarians and the staff in the library. However, after the dust settles on the system, we expect that some of the staff and library positions may be directed toward some of the emerging efforts in the library — archives, Digital Commons, open access publishing, and the development of an institutional repository for research results/data publication and preservation.

Since we had overloaded the collection development/systems librarian when she relieved the archives librarian, we hired a systems/IR librarian position to assist her by using the funding from the vacant technical services staff position. And since administration is holding firm to a zero sum budget strategy, the additional funding for the position was afforded by the differential between the salary of a departing instruction librarian and a the new instruction librarian. The increasing demands of online presence, the swift evolution and increasing utility of the technologies of interactive Web pages, and the complexity and mutability of a growing variety of competing vendor technologies and platforms made it prudent to hire assistance and backup for our systems.

We are not able to move robustly into any of the new frontiers of librarianship. They are major frontiers for small libraries like ours with very limited personnel and budgetary resources. They are nevertheless arenas in which we must make our best efforts to serve our institutions. The shifting parameters of publishing to open access require navigation, ramping up, and eventually support for the needs of both administration and faculty. The library must discern and articulate its role in the provision of services for the emerging needs. To what degree and in what manner are we to provide the technology, systems, information, and labor required to comply with the rising expectations and regulations for the research results/data associated with federally funded grants for open access to the public? Do we not yet have a robust enough institutional repository? Should we outsource or develop an in-house alternative? What level of support are we to provide faculty in their efforts to move to open access publication? Do we explore and provide guidance on alternative publication channels in their various disciplines? Do we promote the virtues of open access?

We have initiated a Digital Commons Web publication platform using Bepress. We have put up a variety of collections including scanned archival material, student masters theses, and the publication of a peer-reviewed student journal. What is the extent of our obligation to provide online access to unique local materials or to provide infrastructure, support, and labor for student and faculty online publication? We have recently moved the operation of a teaching resource center, its audio/video production lab, and an instructional technologist into the library. We will circulate audio video production equipment and assist students and faculty with their use. The instructional technologist is also an accomplished author of fiction and very familiar with online independent publishing channels. This arena is ripe for exploration but we have very limited resources. Where do we focus them?

Instruction and Reference

Instruction used to be an introduction to the card catalog and paper periodical indexes. Reference was also instruction. It was one-on-one instruction at point of need in the use of a complicated array of print information resources. Search technologies have become much easier for students and faculty to navigate albeit more complex and nuanced with respect to locating optimal resources. Google continued on page 85
Collecting to the Core — Computing Instruction Manuals

by Stephen Patton (Assistant Librarian and Chair of Systems, Indiana State University; Computer Science Editor, Resources for College Libraries) <stephen.patton@indstate.edu>

Column Editor’s Note: The “Collecting to the Core” column highlights monographic works that are essential to the academic library within a particular discipline, inspired by the Resources for College Libraries bibliography (online at http://www.rclweb.net). In each essay, subject specialists introduce and explain the classic titles and topics that continue to remain relevant to the undergraduate curriculum and library collection. Disciplinary trends may shift, but some classics never go out of style. — AD

Collecting materials to support the undergraduate curriculum in computing (including computer information systems and computer science) presents several obstacles. Faculty-driven selections in computing are often skewed toward highly theoretical texts based on individual interests and research. Additionally, the library collection in computing should not only support teaching and student research, but should also help prepare students for professional work in the industry. Furthermore, collecting with undergraduates in mind requires the selector to accept that many of the most useful and vetted materials in this discipline are product manuals and certification manuals, as well as course books, textbooks, and survey texts. Though many academic libraries avoid adding these types of materials as a general selection policy, instruction manuals like certification guides and course books often provide critical foundational knowledge for computer science students and help ensure that graduates with a degree in computing will be equipped with a basic understanding of core concepts. In “Textbooks, Leisure Readings, and the Academic Library,” Cynthia Hsieh and Rhonelle Runner explain that there is no true consensus over why librarians have decided not to collect course textbooks, even though they are in high demand by students. Indeed, in the domain of computing materials, certification manuals and textbooks arguably belong in a core collection. Drawing on my experience as a library selector and systems administrator, as well as graduate work in computer science, this essay outlines rationale and specific works in support of including computing instruction manuals in the library’s collection.

Since many of the published monographs in computing are specific to particular topics, such as cryptography in networking, one reason to select introductory or survey materials such as textbooks is to ensure that students have access to basic information, in this case an introduction to cryptography as well as a survey of networking, before approaching more specialized works. While there are survey books that are not strictly textbooks, those which are regularly used in the classroom have typically undergone several revisions and tend to be better structured, edited, and most importantly, thoroughly vetted by a large readership body. This last point is particularly important for computing, since it is vital for students working with example code to know that there are no errors. It seriously impedes the learning process to try to learn from and work with code that is full of errors. William Stallings has produced a substantial body of important textbooks for computer science fields (as well as the Website Computer Science...
These efforts, bibliographers might look toward certification courses as electives. To support computing faculty may have mixed feelings on incorporating certification training into the undergraduate curricula. For one-and-a-half days on the Monday and Tuesday prior to the Charleston Conference! Stay tuned!

http://www.katina.info/conference

Brainstorming the other night with the awesomes Mitchell Davis and Carolyn Morris and the newly-hired Biblioboard employee Steve Sutton (yes, you heard me right) and my wonderful husband Bruce, we had the idea for a Charleston Conference band... or music group... There are so many musicians in our midst! In fact, I was talking by email to Scott Plutchak about this since he is part of the Bearded Pigs who I have always wanted to get to perform in Charleston. But Scott says they retired the annual Bearded Pigs event at the MLA meeting last year since there were too many logistical and other issues. Of course the initial challenge is getting the right core group of musicians together, as Scott says. But he adds a thought — suggests an open mike session one evening during the Charleston Conference. People would sign up for fifteen minute sets ahead of time. That could be a fun event in itself and help identify some people we could tap for something the next year. What musicians or musical schools want to help with this crazy idea? Jack Montgomery, how about you? Seems like every other person mentions music in the Against the Grain profile! Fun, fun, fun! Who is interested? Please let me or Leah Hinds know! <leah@katina.info>

Endnotes

Rumors from page 62

We are excited to have a UNC-Chapel Hill School of Library and Information Science Data Curation Course which will take place for one-and-a-half day on the Monday and Tuesday prior to the Charleston Conference! Stay tuned!

www.katina.info/conference

Brainstorming the other night with the awesomes Mitchell Davis and Carolyn Morris and the newly-hired Biblioboard employee Steve Sutton (yes, you heard me right) and my wonderful husband Bruce, we had the idea for a Charleston Conference band... or music group... There are so many musicians in our midst! In fact, I was talking by email to Scott Plutchak about this since he
Curating Collective Collections — Emerging Shared Print Policy Choices as Reflected in MOUs

Column Editor: Sam Demas (College Librarian Emeritus, Carleton College & Principal, Sam Demas Collaborative Consulting) <sdemas03@gmail.com>

How are consortia actually addressing the questions about shared print policy and practice outlined in the previous CCC column? The following analysis of a set of shared print Memoranda of Understanding (MOU) is an overview of the key policy choices consortia are making as they begin to build the foundations for a network of robust supra-institutional collective collections. The next column will discuss lessons learned from this analysis.

After reviewing 37 relevant documents, the following criteria were used to develop a focused subset for analysis:

1. Include MOUs from currently active shared print programs that:
   - involve multiple legally separate institutions;
   - were conceived as shared print programs from the outset; and
   - are known to be operational and to have completed work on MOUs that address most of the key considerations in organizing a shared print program that can be reasonably expected to survive the tests of time in ensuring long-term preservation of and access to collectively managed legacy print collections.

2. Exclude potentially relevant documents from programs that are:
   - outside North America;
   - for pilot projects of short duration;
   - not actual MOUs or agreements that require legally binding institutional agreement to a set of terms; or
   - “last copy” policies.

Applying these criteria yielded the following set of MOUs:

2. Central Iowa Collaborative Collections Initiative “CI-CCI Memorandum of Understanding” 2013
3. Committee on Institutional Cooperation (CIC) “Memorandum of Understanding for Provision of Shared Print Repository Host Site Services” 2011 (draft; not for distribution)
5. Five College Consortium (5C) “Five College Library Depository Policies” 2002 (last updated 2013)
7. Great Western Library Alliance “GWLA Journal Distributed Print Repository MOU” 2012
8. IA State, UIA, UW-Madison (IA/UW) “MOU Distributed Print Repository” 2011
9. Maine Shared Collections Cooperative (MSCC) “Memorandum of Understanding” 2013
11. Orbis Cascade Alliance Distributed Print Repository “MOU – OCA Member Institution Agreement” 2009
13. Western Regional Storage Trust “WEST Program Statement” 2011

While these criteria excluded many thoughtful documents, they sharply focused the analysis on a subset of MOUs that are more directly comparable in intent and scope than the larger set of documents. Of the 13 MOUs that fit these criteria, the oldest (approved in 2002) is that of 5C and (77%) were developed since 2010. Only two of these MOUs were included in Constance Malpas’ very useful 2007 analysis of the first generation of shared print agreements. My hope is that analysis and lessons learned from it will provide an updated view of emerging shared print policies that consortia will find helpful in shaping shared print programs.

Analysis of MOUs

This analysis reports on major policy considerations in shaping a policy and governance framework for shared print, with particular attention to selection and collective management of these shared collections. Most of the actual MOUs are available for more in-depth analysis.

1. Program description, principles, purposes, goals, and definitions — Many MOUs use language similar to that of the 5C to describe their purpose, which is to secure persistent deposit of lesser used materials to provide members with “…the assurance that they can withdraw duplicates of deposited items from their campus collections and rely with confidence on access to the copies placed in the Depository.” Of the 13 MOUs in this analysis, eight (62%) are distributed archives, three (23%) utilize centralized storage facilities, and two use both storage models. One MOU (PALCI) call for both a “light” archive and a “dark” archive (non-circulating copies).

2. Eligibility and participation — Ten (77%) of these shared print programs grew in some way out of pre-existing consortia, and three (MI-SPI, IA/WI, CI-CCI) are groupings of libraries that came together specifically for the purpose of establishing a shared print program. In most cases it seems that not all members of pre-existing consortia are required or expected to participate, though this is often implicit in the MOU. Nine (69%) specify only one category of membership, while two (15%) have multiple categories (e.g., archive holder, builder & supporter), and one allows libraries outside the existing consortium to join as “affiliate members.”

3. Governance and operations — Five programs (38%) use the existing consortium governance group as the operational group for their shared print program (this is implicit in three MOUs and explicit in two); and eight (62%)

News From the Field

- WRLC Board has approved construction of a third storage module. WRLC is working with Sustainable Collections Services on an analysis of their circulating collection.
- PALCI’s distributed print serials archive is in the process of adding journals published by the American Psychological Association to its existing archive of three STM publisher journals (ACS, AIP, and APS).
- WEST is embarking on a process of program evaluation and strategic planning as it works to achieve sustainability as a fully member-supported program, and as it considers new programmatic changes.
- Hathitrust has initiated a program to expand and enhance access to U.S. federal publications. The first step is to get an idea of the total corpus and compare the holdings of its members, to determine what portion of the corpus is already in the Hathitrust, what portion is not but has already been digitized, and what portion remains to be digitized. http://www.hathitrust.org/usgovdocs
- Maine Shared Collections Strategy is co-sponsoring with CRL a shred print pre-conference at the 2014 ALA Annual Conference on June 27. For more information on “Looking to the Future of Shared Print,” see http://www.maineinfonet.net/mscs/ALA2014/.

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specify that there will be a separate group (typically an operations and collection group or a steering committee). The degree of definition of roles and responsibilities of a “steering committee” varies greatly. Three MOUs (23%) provide for an administrative host or fiscal agent for the program.

4. Scope and selection of materials — Five MOUs (38%) cover print journals only, one (8%) covers monographs only, and seven are written to anticipate the development of shared collections comprising both monographs and journals (and in a few cases an even broader scope of materials). Definitions of the shared collection vary greatly. Seven agreements (54%) mention specific title lists (journals or monographs) that are either appended to the MOU or referenced in it. Six agreements (46%) mention or imply a minimum number of copies for which they seek retention commitments, but most do not specifically address this topic. Only one MOU (5C) explicitly states a “last copy” retention policy. Four MOUs (31%) concerned primarily with journals mention provisions for transfer (or permanent loan) of materials to achieve completeness in retention sets. While a number of MOUs mention the importance of condition (vs. completeness) of materials retained, only four (31%) require visual inspection to determine if the item is actually on the shelf and in good condition. Most MOUs make some reference to the development of future selection methods; this is most often designated as the responsibility of a “steering committee,” or by future collection analysis, or at the discretion of the individual member libraries.

5. Duration of retention commitment — Two MOUs (15%) specify “permanent deposits” (5C and FLARE). Overall, the most common retention period is 25 years (31%, of MOUs). Of the remaining, 23% require ten years, 15% require 15 years, and one group (CIC) requires only a five-year commitment. One MOU (COPPUL) specifies different retention periods (10 and 25 years) for materials at different risk levels. All provide for renewal of retention commitments, usually in the same increments as the initial period.

6. Ownership and location of materials in shared collection — Eleven agreements (85%) state that the member making the commitment retains ownership of the title. FLARE states that ownership of all deposits is transferred to the U of FLA. 5C transfers ownership to the consortium, except for UMass, which retains its ownership of deposits. Materials are stored in the owning library in seven cases (54%), while the balance are in a centralized storage facility or have hybrid arrangements encompassing both options.

7. Collection management/maintenance — In describing the conditions in which shared materials are to be housed, four MOUs (31%) provide for guidelines that will be provided in the future). These are usually posed as recommendations rather than requirements. The remaining nine MOUs are either silent on this topic, or make general statements such as “best environmental and physical conditions it can reasonably offer” or “provide secure and environmentally controlled conditions.” Most MOUs make at least some mention of collection management responsibilities. Four MOUs (31%; COPPUL, CIC, OCA, WEST) articulate specific expectations (or state that guidelines will be provided in the future) on matters such as physical handling, marking, bibliographic identifiers, temperature and humidity, security, conservation and preservation treatments, and protections against inadvertent discard of retained materials. The remaining 69% either avoid detailed address of this topic or use more general language, such as “Use their best effort to maintain, house, preserve...” or “treat retention titles with the same or better care as other materials in their collections...” Only one MOU (PALCI) requires inventory of retained titles (“from time to time”), and none provide any specific guidance or expectations on security (though WEST has separate documents that define requirements for different archive types: bronze, silver, gold and platinum). Nearly all the MOUs include language about replacement of lost or damaged materials, most often along the lines of “....expected to follow their usual workflows and procedures...” Some also require notification if materials are lost and not replaced, or are replaced with a different edition.

8. Access/service model — The majority of MOUs indicate that most materials are meant to circulate in accord with the policies of the owning institution, that periodicals do not generally circulate but reproductions are provided, and that normal ILL channels will be used for loans beyond the participants in the shared print program. All but one MOU (OCA) allows for loans beyond the membership. Several MOUs specifically allow for loan of long print runs of journals for research purposes, while most do not address this issue.

9. Business model — These MOUs reflect two general business models: in seven MOUs (54%) each member covers its own costs in identifying, processing and maintaining retention titles; in six of the agreements there are provisions for cost sharing for both one-time and ongoing costs based on a consortial formula administered centrally. The latter tend to be the larger programs associated with robust pre-existing consortia. In some cases central financial support is provided for members that have taken on extra responsibilities on behalf of the participants (e.g., host site for storage of materials, and “archive builders.”)

10. Bibliographic control and disclosure — Four MOUs (31%) contain some specific guidelines for bibliographic control. Five MOUs (38%) contain general statements about the expectations for records supporting discovery and disclosure (e.g., “shall take all steps reasonably necessary...” or “...title and holdings information shall be made freely and easily available via OPAC...”). Some refer to future guidelines.

11. Withdrawal of members and materials — All but one (5C) MOU makes provision for participants to withdraw from the agreement. Most require a period of notice (usually 1-2 years) and mutual agreement on the withdrawal. The critical question is: does the commitment to retain materials survive withdrawal from the agreement? Three MOUs (23%) do not allow for removal of retention titles from the shared collection (5C, FLARE, CIC). Six MOUs (46%) require members to offer retention titles to other participants upon withdrawal from the agreement. Several provide for waiver of this requirement “if it determines the materials no longer need to be archived.” Two others (15%) make such offering of retained titles optional. In two cases the disposition of retained titles upon withdrawal is unclear. Finally, there is a wide range of approaches and some lack of clarity about the circumstances in which a retained title may be withdrawn by an active participant while still active in the shared print program.

12. Amendment and review of MOU — Nearly all MOUs provide for regular review on some agreed schedule, or on an as-needed basis. Requirements for amending MOUs are generally defined, most commonly as either 2/3 vote or unanimous consent. Few MOUs directly address the question of dissolving the shared collection agreement entirely.

13. Institutional commitment: signatories to the MOU — In seven cases (54%) the signatory is unclear, either because the document did not include a signature page or because the level of institutional signatory is not designated. Two MOUs (15%) specifically call for signature by a President or other university official (CIC, CI-CCI). Three agreements require signature by the library director, and one appears to have been approved by vote of the consortium governing council.

14. Related policies, procedures, and/or guidelines — Most MOUs have related materials appended to the MOU, or refer to other documents, or mention future policy & procedure development to guide action on specific topics.

Conclusion

While the previous column outlined the major considerations addressed in developing MOUs, this one looks at how these policy choices are playing out in a set of recent MOUs. In the next column I will examine what we might learn from this analysis, and offer observations and recommendations, along with topics for further work towards identifying trends, issues, and best practices in policy work in building the collective collection.

Endnotes

1. These are listed in a spreadsheet at www.samdemasconsulting.com.
2. This eliminates a number of “de facto” shared print collections; these began, typically, as shared storage facilities and are in various stages of transforming themselves into intentional shared print collections.
4. The Center for Research Libraries “Print Archive Preservation Registry (http://www.crl.edu/archiving-preservation/print-archives/service-agreements/) is a good source of sample MOUs to peruse.
 Tubes

My iPhone, on Wi-Fi, used to try to log me into any WiFi Router along my way. One router near campus bore the moniker THEN-TERNETISASERIESOTUBES.

Ted Stevens, Alaska’s late senior senator, explained the Internet thus in a 2006 senate hearing on net neutrality. His major point was that as traffic increased, the networks would have to expand through improvements or contract through fees and taxes.

His words went viral in the online world whose libertarian and utopian goals and ideals were well settled. Besides, the Senator had built that bridge to nowhere, he excelled at pork; naturally nothing he said could be taken seriously.

Stevens, however, were he alive and kicking, might have the last laugh. By likening the Internet to a plumbing or electrical wiring, he was trying to shift to a more fitting metaphor to characterize the real nature of the Internet. Those who wanted the Internet to be free preferred to liken the Internet to a road, an information highway, built to move person and freight as freely as possible. Roads were a public utility or a public good.

Recent court rulings and business deals mark a notable turn in metaphor and real behavior. Recently the Supreme Court ruled that Internet providers like Verizon could make deals with content providers like Netflix to charge customers more for higher speed and data services. They ruled that customers could pay more for a wider highway, bigger pipes, more bulky tubes.

Hot on the heels of this decision, Netflix and Comcast agreed to do just that, a move both had resisted throughout the defining period of net neutrality. For some time now, Netflix had proposed to Comcast and other cable providers to put their own servers into the server farms of the providers for faster and higher capacity downloads. The catch was that Netflix didn’t want to pay more for this; they argued that this would help Comcast serve its customers better.

Netflix will now route its video streams through third-party servers that interconnect the two companies. And Netflix will be charged for these services. Customers who want high-speed service will eventually experience higher prices probably from both companies.

Until recently Google and other Silicon Valley Internet companies supported and lobbied for net neutrality. They’ve grown silent since the SOPA legislation fell defeated in 2012. Lately, they’ve let Netflix shape the argument with legislators. Netflix seems to be raising a white flag in the struggle.

Yes, the net is growing up with all of those who work and play on it. It is no longer an almost free service in our lives. Its tubes have been squeezed. We owe Senator Stevens who called the metaphor right. But his people have that bridge to nowhere.

What’s up, Zuck?

Bugs Bunny would understand WhatsApp’s rocket rise in valuation...a bushel of carrots...

This is what Bugs Bunny would hear if he met Brian and Jan, two guys who created WhatsApp in their own version of a Silicon Valley garage in 2009. BTW, they are now the world’s most recent billionaires:

WhatsApp Messenger is a cross-platform mobile messaging app which allows you to exchange messages without having to pay for SMS. WhatsApp Messenger is available for iPhone, BlackBerry, Windows Phone, Android, and Nokia.

Bugs would also learn, between chaps on his bright orange carrot, that although Brian and Jan slaved at Yahoo! for a decade running the advertising platform, they agreed in principle with another stated principle from the canonic Geekster movie, Fight Club:

Advertising has us chasing cars and clothes, working jobs we hate so we can buy stuff we don’t need. — Tyler Durden, Fight Club

On February 19, 2014, Facebook Inc. announced it is buying WhatsApp Inc. for US$19 billion. Facebook will pay $4 billion in cash, $12 billion in Facebook shares, and $3 billion in restricted stock units to be granted to WhatsApp founders and employees that will vest over four years.

Right now, the new owners, Facebook, and the new WhatsApp billionaires are able to eat Carrot and the carrot cake. Facebook stock rose just as it did when they proved they were serious about mobile. This is one more piece of that mobility strategy.

The Facebook phone failed because Facebook isn’t a cell phone company. Most every one of its registered users had cell phones and the loyalty that comes with it. With WhatsApp, Facebook may be repeating themselves. And they will be going up against cell phone providers who are important to them in mobile advertising.

Others have commented that WhatsApp current success is that it exploits a loophole in provider pricing. Today cell phone providers sell access to a network and price for the access. WhatsApp and similar products exploit the fact that now providers do not differentiate use. Once everyone is using the loophole, it is bound to be closed up.

A founder and CEO of WhatsApp Inc., Jan Koum, worked hard on his napkin concept and paid his dues, struggling since 2009 for his big pay day. In the days since, he appears in press as the quintessential Web entrepreneur and evangelist, proclaiming how awesome it is to be part of Facebook yet autonomous. The vision thing is that all is data and technologies built on some other unit of delivery and measure is over. Into the breach steps WhatsApp.

Koum is correct. It’s all about data now, the ones and zeroes. Whether this observation is transformational is another claim altogether. We’ve seen in our own part of the online world that data is easiest to access when it is free. In library-land we’ve used open as our surrogate term but let’s face it, we mean free.

Verizon, Vodafone, T-Mobile, and AT&T remain largely unaffected by the free movements disrupting publishing. Like Google, they sit at one end of the network. They are in charge of delivery of the data.

The library angle or take away: get there first, sign them up, find a Facebook.

Read a Book (verb indicative)

The Library: A World History, text by James W.P. Campbell and photographs by Will Pryce is a stunning example of large format coffee book that rewards the reader with every ounce of effort of its makers. This includes the guys just mentioned but also the University of Chicago Press, the librarians featured, their librarians and staff, and all of us who support the library.

Libraries get love over 300 pages of photographs, interior and exterior, of libraries from all over the world and its history. Included are elevations, detailed photographs, and summptuous words that infuse the visuals with meaning.

No architecture collection should go without it despite its Z classification. One library elevation or model should be part of all design education (which may be). The concept of the library challenges builders and designers with how to collect, catalog, store, and preserve the written record in book form. This is as noble as it is essential.

The Library is perfect in execution down to the exquisite balance of pictorial with information. Even the aroma of the book triggers memories of another publishing era; dare we call it “bookish?”

The book isn’t cheap in the context of Amazon setting the price of new hardcovers in the low teens. Its average based on what a library normally pays. Selling the title for your library not only acquires key historical content but also illustrates the role of the library in leveraging purchases of important but pricey books. It also honors our several millennia of being the key customer of books.

The authors are young. The publisher is a staple of academic and intellectual publishing. It’s for all of us who want a testimony to the library, the libraries, and all dedicated to its mission.
Outsell’s End-User Study: Faculty and Students

by Katina Strauch (Editor, Against the Grain) <kstrauch@comcast.net>
and Kate Worlock (Vice President & Lead Analyst, Education & Training, Outsell (UK) Ltd.; Phone: +44 (0)1494 778 100) <kworlock@outsellinc.com>

Introduction

The information industry is worth more than $700 billion and end-users consume this value for either personal or professional reasons. 1,922 knowledge workers responded to Outsell’s online end-user study, including 429 completed responses in education, (150 faculty, 250 full-time students, and 29 administrators). There are lots of meaty takeaways!

Obstacles to Getting Information

The three major obstacles for faculty are not having enough time or enough budget, and lack of availability of fulltext.

a) 57% of faculty say they lack time. Science faculty feel less time pressure than social science and humanities colleagues.

b) Lack of budget was highlighted more strongly by science faculty (44%) than humanities and social science faculty (38%).

c) Science faculty (31%) found the lack of fulltext more of a problem than HSS faculty (27%).

d) Higher education faculty are also concerned with determining the quality and credibility of resources. This is of particular importance in humanities and social science.

Information Types Used

Overall, respondents rated education and training (41%) as well as STM (36%) materials as the most important types of material used for work.

a) Textbook content comes out on top in the U.S. K-12 and higher education systems. Community college faculty (87%), followed by K-12 faculty (65%), and faculty at four-year universities (60%) considered textbooks their most important types of content.

b) Contrasts between students and faculty: 41% of faculty and only 8% of students picked instructional material as one of their top five choices. Academic journals were picked (37%) by faculty and 20% by students.

c) Science faculty rely on textbooks slightly more than HSS faculty (70% vs. 65%) but far less on journals (19% vs. 48%) and not at all on reference content (3% for science faculty vs. 16% for HSS faculty).

Formats and Platforms

Despite the proliferation of tablets and smartphones, desktops and laptops remain the preferred points of access of content used for work. The percentage of users choosing to access content either from a tablet or a smartphone is no more than 10%.

a) 79% of faculty prefer to access textbook content in print with this strongest among science faculty (88%) than HSS faculty (79%). Despite their reputation as “digital natives” 86% of students prefer to access textbook content in print.

b) 43% of faculty and 25% of students prefer to access journal content in print.

c) Given the figures above, the market for delivering educational content via smartphones remains at a very nascent stage of development.

Learning Management Systems and the Library

Both students and faculty (74%) report using LMS with Blackboard the most prevalent. Science faculty and students use their LMS more than HSS counterparts. Students and faculty who use the LMS log in daily with HSS students leading the way. 65% of faculty and students knew that library services were available through their LMS with students more aware of the library presence (74%) than faculty (50%). Science faculty are the least aware (33%). 45% of HSS faculty access the library online weekly as compared to 17% of science faculty.

a) Students are much more prolific online library users than faculty and 41% of students access the library online; there were no significant differences between science and HSS students.

b) The most popular LMS task is submitting assignments (some are mandatory). HSS students are more likely to submit assignments via the LMS while science students are more likely to check grade details.

Purchasing Behaviors for Educational Materials

Textbooks attracted the largest share of spending by both students and faculty. Science faculty spend almost twice as much as HSS faculty ($388 vs. $166 per semester). HSS students spend more on textbooks than science students ($330 vs. $300).

a) Students get textbooks by the cheapest possible means. 67% buy used textbooks. In the future, students expect to buy fewer print textbooks, renting them, or moving to digital.

b) 11% of HSS and science students do not intend to buy print textbooks in the future. Both students and faculty (76%) believe publishers charge too much for textbooks.

Spending and Purchasing Information

Respondents were asked about their level of involvement in the procurement of external information resources. Not surprisingly, science faculty have a much stronger role than HSS faculty.

a) Faculty are more likely to spend their budgets for their own use. Science faculty report that 11% of buying decisions are outsourced to a library or information center as opposed to 22% of HSS faculty. There may be a disconnect between the type of materials purchased or reported by the two types.

b) Faculty members are more loyal to print but they expect to increase their spend on print/digital bundles. Outsell predicts a stronger shift to digital in the higher education market than the K-12 and expects this to persist over the next three to five years.

c) 55% of total budget is spent on digital content among knowledge workers with 41% for faculty. Print is 19% of the market as a whole but higher for faculty at 36%.

d) 70% of faculty expect their digital spend to increase over the next 12 months and only 14% expect their print spend to rise. As more relevant and appropriate digital solutions come to market, spending on ones that deliver on saving institutions money or improving learning outcomes will rise and this will be at the expense of print resources almost exclusively.

e) 19% of faculty are cautiously optimistic in expecting an increase in budgets for external content. 68% expect budgets to remain stable and 7% expect a decrease.

Desktops, Tablets and Smartphones

Surprisingly, both students and faculty are behind overall knowledge workers in ownership of smartphones. 86% of knowledge workers own a smartphone compared with 76% of faculty and 80% of students.

a) Faculty lead in ownership of laptops, 92% to 79%. 48% of faculty have their laptops provided by their employers.

b) 66% of higher education faculty own a tablet compared to 84% of knowledge workers. Tablet penetration of the student user population is only 41%, though 28% plan to buy one in the next six months. In personal budget allocation, students tend to select the laptop/smartphone as the best value.

c) Students use their smartphones almost twice as much as faculty and their laptops for more than double the time. Users are also “doubling up,” using a smartphone while also using a laptop. Students appear to be staring at a screen of some sort 10 hours a day.

d) Conducting research is the most common activity undertaken by almost half of the faculty, followed by preparation and plan-
ning. There is a clear desire among faculty and end users to access offerings through multiple interfaces at their own convenience. Solely mobile use is not enough given the continuing desire to use laptops and desktops as part of the mix.

Digital Textbooks

A surprisingly high proportion of students and faculty (63%) had never accessed a digital textbook platform though respondents may have been confused by the use of the word “platform.” Of the platforms used, CourseSmart was the most popular. The market is clearly beyond the nascent stage regarding digital textbooks and platforms but it is still some distance from widespread acceptance and penetration.

a) Outsell’s hypothesis about the digital textbook space is that flat replica digital textbooks (PDFs with bookmarking and highlighting capabilities) will act as little more than stepping stones for a more integrated digital future. Whole course solutions such as Pearson’s MyLab, WileyPLUS, McGraw-Hill Connect, and Cengage Learning’s MindTap seem better placed for long-term success. Surprisingly, 39% of users claim not to have used a solution of this sort, though as stated earlier, this may be because of confusion in the use of the term “platform.” HSS students and faculty are much more likely than science students which may reflect the bias of packages toward science than toward humanities disciplines.

b) Outsell also looked at the use of OERs (Open Educational Resources). 78% of faculty agreed that they recommend OERs in addition to other paid-for digital resources

c) 46% of faculty expect to be using only digital textbooks within the next two years.

d) 90% of students feel that digital textbook content should be cheaper than print.

e) The only area in which science and HSS students differed significantly was around the area of trust of digital materials. 58% of science students compared with 48% of HSS students say that they trust print materials more than digital materials.

f) Despite concerns about price, students value accessibility above everything else. Features like search and multimedia content do not figure very heavily, suggesting that there is work to be done on improving the usability experience in the digital textbook arena.

g) Customization was valued by just under one-third of faculty and anecdotal evidence from solutions providers suggests that faculty who undertake customization is marginal. Nevertheless, offering a customization solution to the market is important even if this option is not strongly taken up.

h) Like students, faculty find digital textbooks more difficult to work with than their print counterparts.

Mobile Apps

When it comes to the number of mobile apps purchased and used, student and faculty behaviors are consistent with those displayed in the wider knowledge user community. Students try to find free apps for both personal and professional reasons. Apps are more likely to be used for personal reasons (44%) than professional reasons (33%). The browser remains dominant when undertaking tasks for work purposes.

Social Media

The use of social media is pervasive among both students and faculty. 100% of science faculty and 95% of HSS faculty who responded to the survey use one or more social media sites. Student usage is also ubiquitous with 98% of science and 97% of HSS students using one or more social media services.

a) Students do not use LinkedIn as much as faculty or the overall knowledge worker community as LinkedIn is a recruitment and career progression tool.

b) Within the faculty community, there was no statistically significant difference in the use of LinkedIn by science and HSS faculty, but there was far greater use of LinkedIn by higher education faculty than K-12 faculty.

c) The proportion of faculty using Facebook for professional and personal reasons is double that of students, suggesting that networking is between colleagues rather than between faculty members and students.

d) Faculty are more comfortable with social media sites collection and storage of data about their information habits than students. In fact students are more uncomfortable than your average knowledge worker.

Outsell’s Essential Actions

Build Products That Save Users Time — Time is a key pain point as is budget so time-saving solutions cannot be prohibitively expensive.

Bear Age in Mind — Higher education faculty are on average older than K-12 faculty. Their reaction to digital take up such as being less likely to have a smartphone or laptop may be a hindrance.

Build for Mobile as Part of a Package — There is a clear desire amongst faculty to use mobile devices for work purposes. This is an opportunity for solutions providers to build mobile interfaces to existing solutions. End users require access to offerings through multiple interfaces at their own convenience.

Mind the Textbook Gap — Digital textbooks are still not igniting the imagination of today’s students and faculty. These products have to deliver significantly more value than their print counterparts. It will be vital to look toward institutional purchasing models as a way of guaranteeing revenues and achieving higher sell-through on a per-class basis.

Integrate Reference Content with Other Services — The wealth of high-quality reference material held by solutions providers is being underused and undervalued by student and faculty audiences. Making these services more visible through connectivity with other offerings would bring their value more to the forefront and boost their value to the end-user audience.
Decoder Ring — The CMS is Flat

Column Editor: Jerry Spiller (Art Institute of Charleston) <yeri.spiller@gmail.com>

Web folks, do you ever get a nagging feeling that WordPress or another database-driven CMS might not be the best solution for a particular site you’re building?

When I began to create the site for my Webcomic Boggy Down I knew its architecture could be pretty simple and streamlined. Aside from a few one-off static pages like an “About” page, almost all pages would need a recurring blog-like structure that simply housed an image for each page, with enough markup to keep them organized and accessible.

Considering the needs of the project, I found myself asking if the architecture for the underlying content really required the overhead of a database-driven CMS. Did the site need text and media content housed in a SQL database? Or different sets of admins with different levels of privileges? Did most of those admins need WYSIWYG editors? I had to question if I was looking at WordPress out of habit, despite the fact that another solution might be more appropriate. Simple can be freeing. Why house content in a database if I don’t need to? Why have various users in a database if it’s only me, and server access is all I need?

I know a lot of librarians working on Web projects face similar concerns, so I’ll share the results of my search to find a more streamlined solution for a project that didn’t necessarily benefit from MySQL in its stack. Not that WordPress hasn’t given us a lot and isn’t a great fit for many projects. Still, I’m sure a lot of folks working on presenting a body of images or other media content for digital libraries or special collections, or even reference and instruction, have looked at their back of images or other media content for digital great fit for many projects. Still, I’m sure WordPress hasn’t given us a lot and isn’t a benefit from MySQL in its stack. Not that solution for a project that didn’t necessarily projects face similar concerns, so I’ll share the is all I need?

a database if it’s only me, and server access if I don’t need to? Why have various users in a database if it’s only me, and server access is all I need?

Jekyll

Jekyll is built on Ruby and is described by its developer Tom Preston-Werner as a “blog aware static site generator” (2013). It is released under the free and open source MIT license. Jekyll powers GitHub Pages, so it can handle large sites with multiple lower-level admins providing loads of content. In addition to Markdown and HTML, it also supports the lightweight markup language Textile as well as Ruby’s Liquid templating. It can be extended to work as a blog with a little custom work, or use of its companion Octopress. Octopress provides a blog-ready HTML template for Jekyll and uses Git cloning to support multiple sites (Octopress 2011).

The main caveat I see for Jekyll is that if you aren’t accustomed to regularly writing Ruby and maintaining your Ruby environment (I do not and was not) it probably requires too much configuration and too many updates to dependencies to be really practical use. If your Ruby is strong, I could see this being a great fit for large digital collections.

Pico

Pico is a PHP-based CMS by Gilbert Pellegrom from Dev7studios. It is also released under the MIT license. Pico is built to employ Markdown exclusively, though Markdown files can contain HTML. Pico offers a truly flat directory structure, with .md files stored in a folder called content. Each content file typically starts with metadata, with available fields such as title, date, author, title and description (Pico). Like our other choices, HTML structure, and CSS styling are completely up to you.

Kirby

Kirby is a CMS created by designer and developer Bastian Allgeier. Like Pico, it is PHP-based. After stumbling across Kirby and experimenting with it a bit, it seemed to match up well with Boggy Down’s needs, being light and adaptable without a lot of overhead.

Coding for Kirby should seem instantly familiar to anyone used to writing PHP. Content files use Markdown, in a framework written by Allgeier called Kirbytext. Content files are .txt by default but could be changed to .md or another format in the config file. Kirby wraps the content up in custom, array-like objects based on its directory structure. When writing your PHP and HTML, these can be accessed through its jQuery-inspired API, manifesting a philosophy which might be described as “look for a thing, then use or modify the thing.” See Figure I below.

Kirby’s sensible folder and object hierarchies, along with organized and easy to follow documentation from Allgeier, really set it over the top for me. I found creating and referencing parent-child (and sibling) structure in Kirby more intuitive than in Pico. Allgeier even provides an extremely useful reference cheat sheet (Kirby 2013a). Documentation also includes growing list of tutorials for extending Kirby, including writing blog templates, configuring your RSS feed, hiding your backend content files, and creating “art directed” posts with their own unique styling (Kirby 2013b). I found the tutorials easy to follow and implement. Boggy Down’s main content area, the comics, is just a blog made with the help of Allgeier’s blog tutorial, with the main blog page customized to return only the single most recent post as a page.

Kirby’s default metadata might seem less robust than Pico’s, but it is easily extensible. You can add any field you like. Allgeier offers: “If you need more fields for your template — maybe you want to show a date on that page or a subtitle — simply add more fields to the text file. [...] After each field you have to add a subtitle — simply add more fields to the text file. [...] After each field you have to add four more fields to the text file.” (Kirby 2013c). From the PHP, Kirby makes these new fields, which you can think of as custom variables, available from methods with corresponding names:

$posts->yourvar()
Annette Taylor (p.30) noted that in her spare time, she enjoys anything that gets her away from a computing device. Ain’t it the truth?

And reading the Forbes interview with Anthea Stratigos (see above) I was interested to see that she and her husband, Greg Chagaris, make a point of going computer-less when they vacation. This may be a growing trend?

One last thing before I go, what do you think is the sexiest part about being a librarian? Got this from Ileana Jacks who found it on Instagram.

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Speaking of ATG profiles, I noticed that Anneliese Taylor (p.30) noted that in her spare time, she enjoys anything that gets her away from a computing device. Ain’t it the truth?

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A s I was contemplating what I might write, and how I might jazz it up a bit, it occurred to me that I simply needed to use the same technique that Darren Aronofsky used in his new movie, Noah — change the facts to create controversy in order to gain attention, and then hope my readers won’t lose the central thought just because I strayed from the truth a bit.

In Noah, Darren Aronofsky kept to the general plot — there was going to be a lot of rain and an ark was needed to save the animals and the members of his family. But that wouldn’t do much to fill the 138 minutes of the film. Interest generating conflict was what was needed. Noah, the movie, is full of it. There is a villain named Tubal-Cain who opposes Noah generally, who leads a hoard of saber wielding infidels intent on taking over the ark, personally stows himself away on the ark to escape the flood, and fights Noah to the death. There are stone giants with hearts of gold to battle the vicious hoards. None of this is in the Bible but it gets everyone’s attention.

In the end I decided to talk about the new Pew Foundation report on public libraries that shows that 69% of Americans like and/or use libraries to battle the vicious hoards. None of this is in the Bible, its not because 7% of the people surveyed simply don’t see libraries as relevant to their lives; it's not because 30% or so of library use is simply the users of libraries to and by others. It is not because 4% simply don’t see libraries as relevant to their lives; it’s not because 7% of the people surveyed are transients, ignorant about libraries; it’s not because another 7% are living with disabilities or other roadblocks which prevent them from using or knowing about libraries; it’s not because another 10% are older and poor; and its not because a final 4% are poorly educated and "disengaged" from their communities generally. What is the real reason? In the spirit of the movie Noah, I can now reveal it is the fault of the Tea Party corrupted Republican Party. The Republicans, especially those in the House of Representatives, understand that poorly educated poor people are more likely to be scared by evil stories about the White House run by a Kenyan and who will consequently vote for Republicans. Therefore, they are doing all that they can to increase the number of ignorant paupers to insure that they can maintain a Republican House and hopefully win control of the Senate. That this elodes support for public libraries is just tough luck. I was tempted to do this, but decided against it.

So, at the risk of putting you all to sleep, I would like to talk seriously about the Pew Report (How Americans Value Public Libraries in Their Communities, http://libraries.pewinternet.org/files/legacy-pdf/P1P_Libraries%20in%20communities.pdf) and what we might do to increase what is already a very positive margin of support for public libraries, or indeed all libraries.

The authors of the Pew Report identified nine types of library users from "Library Lovers" to "Off the Grid," but then grouped them into four larger categories — high engagement, medium engagement, low engagement, and none [absolute no engagement]. They explain the reasons for each of these levels. What I would like to focus on are the types of people in the low and zero engagement [none] categories, and ask what we might do to move each of them up toward a level of higher engagement. Based upon my own reading of this report, here are the five major reasons for lower levels of library engagement:

1. Some people, for some reason or another, have negative views about libraries and barring some as-yet-unexpected experience, will continue to hold to this opinion.
2. They are transient members of, or simply “disengaged” from, their communities. Libraries simply don’t have a role in their lives, these folks don’t even know where the nearest public library is located.
3. Some, while they don’t deny the value of libraries for others, have personally never used a library.
4. About 7% of the people studied are saddled with challenges that make going to a library difficult, e.g., are elderly, have a disability, live in a remote location, or are caring for a sick person in their family.
5. Some have low household incomes and/or low levels of education.

There is not space here to list all of the things that might be done to increase engagement with, and/or support for, libraries — other than putting the blame on the Republicans — but here are some ideas that I have seen pursued elsewhere, or which have occurred to me, and invite you to think seriously about what you might do in your community or library setting:

1. Develop a “Top 10 Things Your Library Can Do For You” handout and mobilize patrons, scouting and religious groups, etc., to take a copy to every household along with an invitation to go to the library.
2. Figure out how to identify new members of your community, give them a copy of the Top 10 list, a map showing where the library is located, and something telling them how to get a library card.
3. Hold non-library events of all sorts in the library to get those who have never been to the library to go there. Invite community groups to hold their meetings in the library — and don’t charge them.
4. All libraries have unneeded books, magazines, DVDs, etc. Give/revolve collections of these sorts of things to nursing homes, offices, housing centers, etc. Make sure every item has an invitation to visit the library affixed to it.
5. “Facilitate” the ability of those who visit/help the elderly, the sick, the poor to take good but no longer needed library materials to these members of our communities. These helpers will welcome such materials as a way of not simply going to hear about how their friend/client’s gall bladder is doing every time they visit. Maybe they can also take an inspiring biography or book of poems to read to the person they are visiting.

I have a souvenir T-shirt from one of the University of Hong Kong Library’s annual library leadership retreats that has the following statement by the Argentine writer and librarian Jorge Luis Borges written on it: “I have al-continued on page 93
Data-Planet Offers Unparalleled Access to Statistical Data

Harmonized Data with 37 Metadata Fields Including Abstracts & Subject Terms
Multiple User Interfaces - Customizable Maps, Charts, Tables and Graphs
270,000 Metadata Records with DOI Links in xml, txt & mrc Formats
75 Source Organizations - 2+ Billion Infographics with DOIs
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Publisher buyouts, takeovers, mergers, and distribution changes all have contributed to an industry-wide dysfunction affecting book order fulfillment. Inadequate fulfillment is especially felt by the librarians who bear ultimate responsibility for meeting patron demand.

At Midwest, we realize that accurate and timely order fulfillment is the benchmark service by which vendors (and librarians) are judged. We do not accept an out-of-print or out-of-stock notice from a US publisher as final proof that the book is not available, having found that inventory is often available in the UK and elsewhere.

By taking the time and effort to research these titles, Midwest has a superior level of success in supplying them. Some trade jobbers will often simply relay the publisher’s report and cancel such titles.

We do not accept publishers’ OP, NOP, and TOS reports without further research to determine their validity. Our research specialists are dedicated to locating hard-to-obtain titles.

By diligent research we are able to locate many book orders that would otherwise be lost due to publishers’ bad reports, inadequate research, or database dead-ends. Our researchers take over the hunt for titles where computers leave off. We will not cancel an order until we determine that a book is truly unavailable.

Contact Midwest and watch your fulfillment level and patron satisfaction improve!