



28th Annual Conference

June 6-9, 2013

Buffalo, New York

NASIG Newsletter

Vol. 28, no. 3

September 2013

eISSN 1542-3417

Conference Reports

Vision Sessions

[Libraries and Mobile Technologies](#)

[The Value of Serials in Academic & Special Libraries](#)

Conference Sessions

[The Aggregator Database: Cornerstone or Annex?](#)

[Foundation for Collection Mgmt Decisions](#)

[Collaboration in a Time of Change](#)

[Advocating for Scholarly Communication](#)

[Discovering Music](#)

[Diversification of Access Pathways](#)

[The End of Nostradamus](#)

[E-Resources Acquisition Checklist](#)

[EXPO-nential Success Redux](#)

[Revamping Technical Services](#)

[From Record Bound to Boundless](#)

[Fundamentals of E-Resource Licensing](#)

[Competencies for New E-Resources Librarians](#)

[Core Competencies and Library Reorganization](#)

[LibX: The Small but Mighty Button](#)

[Losing Staff: The Seven Stages of Loss and Recovery](#)

[Realizing the Value of Non-Purchased Content](#)

[Scholar Commons @ USF](#)

Vision Sessions

Libraries and Mobile Technologies in the Age of the Visible College

*Bryan Alexander, Senior Fellow at the National Institute
for Technology in Liberal Education (NITLE)*

Reported by: Mary Ellen Kenreich

Author Supplied Abstract: How is the mobile revolution transforming libraries? What will library services and librarians look like in the age of a ubiquitously networked civilization? We begin by surveying what changes have already hit: an expanded device universe, the e-book renaissance, the growth of new media ecosystems, nearly-always-on user access, and the initial switch from 'library as place' to 'place as library'. Next we assess how mobility has impacted academia, from teaching to research and student life. Then we explore scenarios of the future, based on an analysis of current trends. Scenarios include: Post-Residential Academe; Open World; Silo World; Alt.Residential.

Bryan Alexander, publisher of the monthly online report, *Future Trends in Technology and Education*, gave a lively presentation on new mobile technologies related to education. Technology is changing rapidly, and with Alexander's fast paced presentation, one might wonder what else had developed during his talk.

Personal computing has made a progression from the desktop computer, to laptop computers, and now has exploded into many handheld devices. Smartphones, for example, are used for content delivery, for social

interaction and for capturing content. Internet access is no longer confined to a stationary desktop; the smartphone is now our primary gateway to the internet. Tablets, e-book readers, and a multitude of other handheld devices are now mainstream.

Alexander discussed technologies such as clickers (<http://www1.iclicker.com/>) and smartpens (<http://www.livescribe.com/en-us/smartpen/>) used in classrooms. Clickers are used in classrooms for gathering feedback, answering quiz questions, and for assessment; the results can drive class discussion. Clickers allow a large lecture class to engage in an interactive learning environment. Alexander asked how many of us know about smartpens. They are a highly portable and multifunctional device used as a text scanner, audio recorder, and for web access. Technology is revolutionizing classroom instruction.

A few general technology changes were discussed as well. Touch screens, gesture based computer interfaces, and Google Glass may make the mouse and keyboard obsolete. Mobile devices drive the creation of micro content. *Vine* is an example of a mobile app designed to capture micro videos up to six seconds in length and share it with a world of people with an insatiable appetite for media.

Alexander then moved on to gaming and how it has changed the world. People of all ages, races, and genders are gamers and the games are just as diverse as the individuals playing them. Games can be serious, public, political, etc. and can have a massive audience. "Gamification" means taking game principles out of the game context to engage people and change behavior. We can use games to impact society in a positive way. Alexander doesn't endorse it; he just knows it is happening.

ARIS (<http://arisgames.org/>) is open source platform for designing educational games or virtual tours to promote learning. With the ARIS app, you can go to a location, hold up your device and get more information about what you are viewing. *Wikitude myWorld* can be used to create an augmented reality scenario with a

handheld device. *iTacitus* is a program developed in Europe to encourage cultural tourism. It uses augmented reality to overlay a scene or annotate a view with text and videos, and is used at museums and historical sites. *Google Goggles* is an app for taking a picture and searching Google. It is a visual, rather than a text search.

Bryan concluded his presentation by presenting three scenarios for 2023. It will be the world of the future, transformed by what is happening now.

1) Phantom Learning

Schools are rare and distant. Information is plentiful and we get it on demand. Institutions supplement information. MOOCs are common. Libraries are software.

2) Open World

Open access and open source is the norm. There are global conversations, with more information and more access. Creativity abounds and campus is chaotic. Authorship is hard to pin down. Privacy is fictitious.

3) Silo World

The Web is over. Information is in vertical stacks, and we love our stacks. Careers are within those stacks. "Open" was a flawed historical concept.

About the Presenter



Bryan Alexander is senior fellow at the National Institute for Technology in Liberal Education (NITLE). He researches, writes, and speaks about emerging trends in the integration of inquiry, pedagogy, and technology and their potential application to liberal arts contexts. Dr. Alexander's current research interests include emerging pedagogical forms enabled by mobile technologies, learning processes and outcomes associated with immersive environments (as in gaming and augmented reality), the rise of digital humanities, the transformation of scholarly communication, and digital storytelling.

The Value of Serials in Academic and Special Libraries

[Megan Oakleaf](#), Associate Professor of Library and
Information Science, Syracuse University

Reported by: Heather Barrett

Oakleaf discussed serial collections and how libraries have attempted, and often failed, to measure and demonstrate the value of collections to their institution's administration. While it is important to measure and demonstrate the value of all library collections, it is especially critical to do so for serials, given that serials collections (including periodicals and electronic resources) consume a large percentage of library budgets and their costs are steadily on the rise. Unfortunately, the data we have typically collected about serials such as usage statistics, user satisfaction, the size and monetary value of the collection, and return on investment are not compelling metrics of value for institution administrators. Collection-centered data without context tend to elicit the response, "So what?"

Instead, we need to start collecting and communicating information about the impact of serials: the value of serials in meeting the needs of users and in supporting the mission, values, and goals of the parent institution. Impact is not about the size or value of the serials collection, but rather what people are accomplishing through the use of the collection and how the institution values that outcome. Measuring impact highlights the importance of the collection's influence on outcomes and administrators are more likely to respond, "Tell me more!"

Librarians must first identify areas that are most important to their institution and then be able to tell administrators what the serials collection contributes to those priorities. For example, higher education priorities might include student recruitment, learning outcomes, alumni career success and lifelong learning, faculty teaching and research, faculty grant-seeking, institutional prestige, and accreditation. Corporate

priorities might include efficiency of operations, decision making, project planning and progress, quality of client relationships, and exploitation of new opportunities. Medical priorities might include diagnosis and treatment, quality of patient care, and reducing patient mortality.

The next step is to develop defined outcomes describing the impact of serial collections on users. An outcome might take the following form, "[Users] will be able to do [thing that the institution or organization values]." For example, "Students will be able to effectively evaluate information found in serials"; "Doctors will be able to make more accurate diagnoses using serials"; or "Lawyers will be able to win more cases using serials." Once the outcomes are developed, we must determine how we will know that the outcome has been met and what data we will collect in order to reach that conclusion.

This brings us back to the problem that most of the data we have typically collected about our serials collection is insufficient for analyzing impact. We need to collect different data within the library and ask vendors for data that supports determining the impact of subscribed materials. Specifically, we need data about what individual users are doing with serials. The usage data we currently get is aggregated group-level data with no information about individual users. Starting an analysis with individual-level data would help libraries track how subscribed content is used. Any personal identification information about the users could be hidden to preserve privacy. ACRL is working on a product that can track who is using materials and for what purpose. Vendors may already have individual-user data for their own product improvement research. Librarians need to start asking for this kind of data; in the meantime, they can start small and perhaps partner with researchers who are already working at their institutions.

Finally, we must communicate the results of our assessments of impact. Impact-based value assessment can help ensure that library budgets don't suffer needlessly. Perhaps even more importantly, we can

discover new and better ways to improve our resources, expertise, and services to users and to further expand the impact of library collections.

About the Presenter



Megan Oakleaf is an Associate Professor of Library and Information Science in the iSchool at Syracuse University. She is the author of the *Value of Academic Libraries Comprehensive Review and Report* and

has earned recognition and awards for articles published in top library and information science journals. Her research areas include outcomes assessment, evidence-based decision making, information literacy instruction, and academic library impact and value.

Dr. Megan Oakleaf has done extensive research, speaking, and writing on the topics of library assessment and evidence-based decision making. Her publications include *Value of Academic Libraries: A Comprehensive Research Review and Report* for ACRL and *Academic Library Value: the Impact Starter Kit*.

Conference Sessions

The Aggregator Database: Cornerstone or Annex?

Beverly Geckle, Middle Tennessee State University
Suzanne Mangrum, Middle Tennessee State University

Reported by: Sharon K. Scott,
Edited by: Beverly Geckle

Author Supplied Abstract: With the goal of building a high quality academic library collection in mind, the presenters evaluated the value of journal content accessed through journal aggregator database(s). Data from aggregator provider(s) and data from UlrichsWeb was used to evaluate content with respect for quality, format, coverage, and cost. In addition the presenters shared the analysis with library liaisons to inform them of “true holdings” to assist them with collection development.

The research conducted by Geckle and Mangrum focused on e-journal collection development and assessment. The content of EBSCO’s Academic Search Premier (ASP) was analyzed for quality. A base level of quality was determined to be content from peer-reviewed journals, with full-text access and available in PDF format. Further filtering was completed to consider holdings coverage. Academic Search Premier was chosen as it was popular on campus and data could be downloaded into Excel. Ulrich’s Web was consulted to identify journals in ASP in the following subject areas: business & economics, social sciences & humanities, government & law, education and sports & recreation. Journal Citation Reports (JCR) was used to identify impact factors and scholarly rankings. Microsoft Excel was used to find common titles in the subject sets from Ulrich’s and JCR top impact titles.

The final title lists of high quality journals were grouped into the following coverage categories: to present, end date, and embargo. The results were not surprising. A significant number of the ASP journals in the subject areas investigated were not top ranked journals and if they were most of those had limited coverage or were embargoed. The results did highlight the relationship between discovery and access within the context of aggregators. In many cases ASP may not have the full-text content, but if the library subscribes to the title directly with the publisher then the patron still obtain access. Aggregators seem to be less content providers but indexing and discovery services. Now that discovery services such as EBSCO’s EDS are available the value of the aggregator is drawn into question.

About the Presenters



Beverly Geckle earned her MLS in 2000 from the University of Maryland, College Park. She is the Serials & Government Documents Librarian in the Collection Development & Management Department at Middle Tennessee State University where she has worked since 2006. Prior to MTSU she was the Serials Librarian at the University of Baltimore Law Library.



Suzanne Mangrum earned her MLS in 2003 from the University of Southern Mississippi. She began her library career as the Acquisitions Librarian at Christian Brothers University in Memphis. She has been at MTSU for seven years in the Collection Development and Management Department.

Building a Foundation for Collection Management Decisions: Two Approaches

[Leigh Ann DePope](#), *Salisbury University*
[Mark Hemhauser](#), *University of Maryland*
[Rebecca Kemp](#), *University of Maryland*

Reported by: Paula Sullinger

Author Supplied Abstract: Salisbury University and the University of Maryland both undertook projects to evaluate the effectiveness of EBSCO Information Service's Usage Consolidation product and the usefulness of the data extracted for collection development decisions. The goals of implementation were to centralize the collection and analysis of e-resource usage data and to allow collection management librarians easy access to usage and cost per use data to aid in their decision-making. The presenters will discuss how staff at each institution populated Usage Consolidation and presented usage reports to collection managers; how collection managers responded to the data; and how they used the data to inform collection management decisions.

Mark Hemhauser and Rebecca Kemp from the University of Maryland, College Park (UMCO) and Leigh Ann DePope from Salisbury University shared their experiences using EBSCO's Usage Consolidation (EUC) service. They described the process of populating the service, which can be laborious. Fortunately, many of the journal platforms are pre-populated. For each platform, the librarians enter the statistics URL, the username/password, optional notes about the platform or its statistics, and select the desired reports. The librarian loads usage reports in EUC manually if the library doesn't use SUSHI. For instance, UMCP tried EUC

and it worked well for some resources but not all. When reports are run an exception list is generated for titles that can't be matched to payments. The first reporting cycle produced many exceptions. They worked to resolve the linking issues and each time the report is run the exception list gets shorter.

UMCP wanted to keep aggregator usage separate from their direct content, and EUC accommodates this workflow. All three librarians spoke about the care that must be taken to ensure you are viewing Year X's cost data and the Year X usage data at the same time. Then they demonstrated some of the reports that EUC can produce for particular titles, by publisher, and the entire list of titles. EUC can only produce the report for titles subscribed through EBSCO; other titles must be manually added to the results. Since a vast majority of both institutions' subscriptions are with EBSCO this was not a significant issue for them.

When Hemhauser and Kemp presented the results at UMCP, the subject librarians reported that they liked seeing the cost and usage data in one place, though they didn't like all of the interface features. They also thought the information would be useful for serials review projects. The results were positive enough that UMCP will continue to use the product.

At Salisbury, this was the first attempt to gather usage data. Their librarians found the information to be overwhelming and cumbersome at first. After DePope presented results by subject areas there was greater acceptance. Salisbury will continue to collect usage data since the administration appreciated the usage data.

About the Presenters



Leigh Ann DePope is the Serials/Electronic Services Librarian at Salisbury University. She is responsible for all aspects of serials and electronic resource management. She has serials experience in both public and academic libraries. Leigh Ann has earned her MLS from Clarion University of Pennsylvania and a BA from the Pennsylvania State University.



Mark Hemhauser has 18 years of experience managing serials acquisitions and is currently the Systems Librarian for the Aleph Acquisitions and Serials module at the University System of Maryland and Affiliated Institutions. He also serves on the e-Acquisitions Team of the Kuali OLE (Open Library Environment) project--an open-source, library-driven project to build a truly integrated library system



Rebecca Kemp is the Continuing Resources Librarian at University of Maryland, College Park. She has served as a continuing resources librarian since

2004, has served on national library association committees, and has participated in a variety of state and national conferences.

Collaboration in a Time of Change

Daryl Yang, Imperial College London, London, UK

Reported by: Marsha Seamans

Author Supplied Abstract: The landscape of libraries' print collection has changed significantly over the past decades. On an institutional level, libraries need to evaluate available resources, local researchers' needs, and find the right balance between print and electronic material in order to support parent institutions' development and growth. On a national level, we have seen different schemes being developed in several countries to support libraries' activities in a time of change. There is no doubt that print materials are being disposed of at an industrial level. When more and more libraries are transitioning into E-only, what's the impact of losing print? Collaboration and coordination regarding print disposal tend to take place on a regional level (e.g. peer-to-peer network) or nationally (e.g. repository libraries, UK Research Reserve), but what about working on an international level? Through my presentation, I'd like to explore relevant issues and share our experience so far.

Daryl Yang, UK Research Reserve (UKRR) Manager reported on the work being done to create a collaborative distributed national research collection. The objectives of the UKRR include de-duplicating low use materials (journals), releasing space to realize savings and efficiencies, and preserving materials and providing access for researchers.

Yang provided the context for establishing the UKRR by stressing the importance of collaboration to commercial success, innovation, synergy and efficiency. In libraries, we have material cluttering physical spaces, and there is growing pressure on space as our institutions expand. Print journals are still relevant for in-depth reading and especially needed in the humanities and social sciences where electronic resources are not predominant.

In order for the project to be successful it was necessary to create a cultural change towards accepting access over ownership. The UKRR was formed as a strategic partnership between the Higher Education sector and the British Library, with funding coming from the Higher Education Funding Council of England.

In phase one, which was an 18-month pilot project (2007-2008) with 8 higher education libraries participating, over 11,000 meters of shelf space was released through de-duplication. Phase two includes 29 libraries from Scotland, Wales and England in partnership with the British Library and is funded through 2015 with the goal of releasing 100 kilometers of shelf space.

For the future, the UKRR has begun to look at other European initiatives and at the overlap between the UKRR and other repositories. Yang concluded by emphasizing that libraries provide a key link between researchers and the pursuit of knowledge, and print repositories provide the safety net to keep that knowledge accessible.

About the Presenter

Daryl Yang is the UK Research Reserve Manager based at Imperial College London, UK. UK Research Reserve

(UKRR) is a £10m national collaborative scheme that aims to tackle issues surrounding low-use print journals and Daryl works closely with a range of stakeholders, partners, and sponsors. Before joining UKRR, Daryl worked as a consultant at Arthur Andersen. She also has extensive experience in the HE sector; she was a university lecturer in business management, and has managed an international research centre in management and a wide range of projects. She also helped operate family business during a time of change and expand it to new markets.

In Daryl's free time, she enjoys people watching, cycling, travelling, and dancing.

Creation, Transformation, Dissemination and Preservation: Advocating for Scholarly Communication (For Academic and Special Libraries)

*Anne McKee, Greater Western Library Alliance
Christine M. Stamison, Swets, Addison, IL*

Reported by: Rachel Lundberg

Author Supplied Abstract: As the fight for research grants intensifies and the pot of money decreases, librarians need to ensure that the topic of scholarly communication remains at the forefront, regardless of funding. Affording researchers avenues to widely share and publish their work and to make it widely available should be a mission both in the library and at the highest levels of the institution. How can libraries make an impact? In this presentation two librarians, a consortia officer and vendor, will discuss how consortia have and continue to play a primary role in advocating for dissemination of information and scholarly communication. Additionally, they will discuss other tools that libraries/researchers can use as a method of collaboration, whether regional or international, and why it is essential for libraries to become part of the solution before they are left out in the cold. Please come prepared to discuss how your library is making an impact on this topic.

Christine Stamison and Anne McKee covered how academic librarians can add value to the scholarly communication process.

Energetically, Stamison started the session by covering creation and transformation phases of scholarly communication. She noted the current trend of multiple authors collaborating across multiple institutions (local and international) using social networking tools. For instance, 60% of publications are co-authored, 88% of articles are co-authored, and publications from emerging nations are increasing. Librarians should provide and support social networking tools, as well as support the research process by identifying research opportunities and potential research collaborators.

Stamison compared three reference management tools ([Endnote](#), [Mendeley](#), and [Zotero](#)) to show how they support creation and collaboration. All three offer private groups and have mobile applications. Mendeley and Zotero offer open groups, social networks, and news feeds. Stamison remarked that product features are not always visible on websites; some sleuthing has to be done.

McKee touched on issues such as guest access ([eduroam](#)), improved access to affordable textbooks (Educause), and knowledge sharing ([Force11](#)). McKee also spoke about open access publishing initiatives: [GWLA+GPN](#), [SCOAP3](#), [Science Europe](#). She also provided examples of consortia dissemination and preservation initiatives, including those for: Interlibrary loan ([OCCUMS reader](#)), monograph and serials ([HathiTrust](#)), shared journal repository ([WEST](#)), scientific research ([BioOne](#)), government technical reports ([TRAIL](#)), water resources ([Western Waters](#)), and federally funded research ([CHORUS](#)).

McKee then discussed the [ARL's Spec Kit 332](#), which found that while many libraries offered advice on copyright and retaining rights, only 25% of advisors have law degrees, or have attended a course on copyright. Libraries have no definitive leadership claim in scholarly communication, and even when the library

is the only scholarly communication service provider in the institution, they are still not seen as the leader. McKee advocated for librarians to take the lead on scholarly communication, and to receive more training on copyright.

The presentation provoked discussion on a number of relevant questions. For example, who should lead scholarly communication in the library -- an academic or a librarian? What qualifying factors should have more sway—the academic prestige of candidates and their access to academic social networks? How can librarians impact researchers' reputations and tenure prospects? Should librarians provide warnings about predatory journal or leave this to researchers' peers?

Attendees also commented that faculty expect librarians to host data, manage data sets, as well as do liaison work. Some university libraries have grant officers that provide grants to authors, as well as roadshows to promote their scholarly communications services.

Scholarly communication librarianship is expected to grow in the same way as subject liaison librarianship. Librarians can add value to their institutions by going beyond traditional services and taking the lead by inserting themselves into the research process.

About the Presenters



Anne McKee is the Program Officer for Resource for the Greater Western Library Alliance. McKee received her M.L.S. from Indiana University, Bloomington and has had a very diverse career in librarianship. She has been an academic librarian, a sales rep for two subscription agencies and now a consortium officer for the past 13 years. A former President of NASIG, McKee is on the *Serials Review* Editorial Board, three publisher/vendor library advisory boards, and strives to balance a busy career with an *even* busier family, including a husband, one high-schooler, one middle-schooler, and two dogs, while being a first year newbie [and admittedly a rather bewildered] club volleyball mom: all this, including

wearing orthodontia! McKee is probably the only person you'll meet with both undergrad AND graduate degrees in Library Science.



Christine Stamison, senior customer relations manager for Swets, has worked in various positions in the subscription agent industry for the past twenty years.

Previously, she worked for thirteen years in academic libraries, primarily in serials, at both the University of Illinois at Chicago and at the University of Chicago Libraries. Christine received her Master's in Library and Information Services from Rosary College (now Dominican University) and is a regular lecturer for serials, collection development, and technical services classes. When not working, you can find Christine in the gym working with her trainer, trying to get in shape for her upcoming vacation hiking up Machu Picchu and trekking around Easter Island.

Discovering Music: Small-scale, Web-scale, Facets, and Beyond

Rebecca Belford, University at Buffalo
Tracey Snyder, Cornell University

Reported by Patrick L. Carr

Web-scale discovery tools are currently transforming the interfaces libraries provide for the discovery and access of their collections. Although these tools are significantly enhancing user experiences, they are also introducing new challenges. The concurrent session "Discovering Music: Small-scale, Web-scale, Facets, and Beyond" examined one such challenge: the unique difficulties of organizing and searching for music materials (e.g., scores, sheet music, and recordings) in a web-scale environment.

In the session's first presentation, Rebecca Belford (music cataloger/reference librarian) provided an overview of some of the specific complexities that make the discovery of music materials problematic in web-scale discovery interfaces. She noted that these

complexities should be of interest to anyone engaged with the challenges of library collection discovery because music materials measure how well discovery tools function at the extremes; in other words, a discovery tool that works well for music materials will also work well for most other library materials. Next, Belford discussed how the Music Library Association's Music Discovery Requirements document (<http://goo.gl/FQk2U>) aims to address these complexities. As she explained, this document, which was released in April 2012, provides a range of best practices and recommendations detailing the characteristics of music materials and providing guidance regarding how the administrators of web-discovery tools can harness AACR2 and RDA standards within the MARC record format to maximize the discoverability of music materials. The document has a FRBR-like structure, and Belford's presentation devoted particular attention to discussing the ramifications of music formats and works within the discovery context, including the navigation between different manifestations of the same work. Finally, Belford highlighted some significant developments in music discovery occurring outside of the traditional library environment, including the application of FRBR principles at the Australian Music Centre.

The session's second presenter, Tracey Snyder (assistant music librarian), considered the discoverability of music materials within the specific discovery interfaces being developed and implemented at Cornell University. After reviewing Cornell's current discovery interfaces, Snyder described the university's efforts to implement the faceted open source discovery layer, Blacklight, as their main catalog interface; Cornell aims to have a beta release accessible to patrons during the 2013/2014 academic year. Snyder is a member of the Blacklight implementation team and is playing a particular role as an advocate for the effective discovery of music materials. She worked with patrons to conduct usability testing for music materials, and, in doing so, she was able to identify strengths and weaknesses related to the discovery of music materials via the Blacklight interface. Collaborating with other members of the implementation team, she was able to address

certain problems identified in the usability testing, but resolutions to other problems are still in progress. Snyder concluded by noting some directions for the future development of music discoverability, including work by the Library of Congress, in cooperation with the Music Library Association, incorporating RDA elements in order to achieve more granularity in search results and creating thesauri for genre/form and medium of performance.

Diversification of Access Pathways and the Role of Demand Driven Acquisition

*Mark England, University of Utah
Phill Jones, Labtiva, Inc.*

Reported by: Heather Barrett

Author Supplied Abstract: The combined influence of rapidly changing technology and the economic downturn has forced librarians and publishers to reassess their respective roles in the delivery of information. Many are realizing that the costs of traditional collection management through journal subscriptions and particularly the 'Big Deal' are not only burdensome but unsustainable. The result of these forces will likely be continuing diversification in access models, with institutions acquiring content through subscriptions, aggregators, demand driven acquisition, document delivery, and repositories. Increased complexity in business models and the high cost of information will bring increasing need for careful evaluation and analysis of financial efficiencies. The obvious place for such analysis to occur is in the library. Demand Driven Acquisition offers inherent cost savings for libraries, as the library only pays for the content that is read. In this session, we will describe a trial of a demand driven service, designed by the technology company Labtiva, and executed in partnership between the University of Utah and Nature publishing Group. The goals of the project are to provide instantaneous access to content for patrons, while providing the means for just-in-time delivery, at a reduced cost per usage.

Mark England and Phill Jones spoke about the increasing difficulty libraries have sustaining electronic journal subscriptions in light of price increases and budget decreases, as well as some alternative methods for providing access to e-journals. England reported that serials costs for his library had increased 16 percent last year, even after cancelling over 240 journals. He decided to examine whether a demand-driven acquisition model might help to cut costs without compromising patron access to journal articles.

ReadCube

(<http://www.readcube.com/access?locale=en>) is a content delivery platform for academic journals that was developed by Labtiva in 2011. ReadCube Access delivers article content on a pay-per use basis on a platform that is free, transparent, and seamless to the end user. A recent survey conducted by ReadCube found that users of academic journals hit about three access barriers per month. When researchers are not able to access the article they need, 27% will give up or find an alternative article, 25% will request an interlibrary loan, and less than 4% will purchase access to an article from the publisher. 40% of researchers will seek the article from a source independent of any library or publisher, be it directly from the author, from a colleague who has access elsewhere, or from an online file-sharing source. This poses problems for both libraries and publishers: the library is unaware that the material is in demand from the patrons, and the publishers lose income. Demand-driven acquisition could reverse this trend of library and publisher disintermediation. DDA can be less expensive than subscriptions or ILL for low-use journals and will save the library money if low use subscriptions are canceled. Publishers will also receive due payment for use of their materials.

England decided to set up a trial with ReadCube Access to assess whether demand driven acquisition would result in any unsustainable over-usage levels, to compare researcher preferences for ReadCube versus ILL, and to compare the costs of ReadCube and ILL. He found that ReadCube Access usage is comparable to ILL usage and that it is more cost-effective than ILL. He

received positive feedback from patrons about the immediacy of article access and the efficiency and ease of use of the ReadCube platform. Some negative feedback was received about the digital rights management which does not allow the user to print, share, or store articles outside of ReadCube and rudimentary search capabilities.

Currently, ReadCube Access is limited to Nature Press content, however Jones reported that they are in negotiations with additional publishers and that they intend to expand their subject coverage to social sciences and humanities. They are working on ReadCube Access 2 with an advisory committee that includes libraries and consortia. The new version of ReadCube Access will provide improved search capabilities, new pricing tiers and access options, including the ability to print and to view articles in a variety of PDF readers. It will also ensure that libraries are charged only for access to unsubscribed content. The long-term vision for ReadCube Access is toward a cross-publisher demand-driven acquisition platform for articles, operated on an iTunes-like business model.

Both England and Jones see demand-driven acquisition as being just one of a diverse range of journal article access methods, along with subscriptions, big deals, open access, and ILL.

About the Presenters

Phill Jones is the VP for Business Development at Labtiva, Inc. He came to Labtiva from the video journal JoVE, where he held the position of Editorial Director. Prior to that, he had a diverse academic career spanning bio-physics, microscopy, and atomic physics. In addition to his work at Labtiva, Phill currently holds a faculty appointment at Harvard Medical School and also works as a microscopy consultant.

The End of Nostradamus: Killing Predictive Check in without Feeling Guilty

[Young Joo Moon](#), *Boston College Libraries*
[Bob Persing](#), *University of Pennsylvania Library*

Reported by: Carrie Doyle

Author Supplied Abstract: In the 1980s and 1990s, ILS software took the next step forward in serial check in: fully-predictive check in systems, which told you exactly what you were going to receive and when. The idea was that check in would take only seconds per issue, and the software would do almost all the work for you. Predictive data would be shared universally, eliminating duplicative work at each library. Standards work and new MARC tags would facilitate data interchange. In the 2010s, the next generation of ILSes is emerging, and predictive check in isn't being included in most of them. What happened to dim the promise of prediction? What sorts of systems are being developed to replace it?

The presentation started with a history of predictive serials systems through the decades that was both entertaining and informative, especially for those of us new to serials. From the Kardex, computer punch cards, and union lists, to predictive systems like NOTIS, VTLS, and FAXON SC-10, Bob led the audience through a history of standards and systems that brought back memories, both fond and not so fond. Fully-predictive check in systems promised to make check in quick and easy since the software did most of the work. However, later system development focused less on predictive check in and more on electronic resource management and knowledgebases. In fact, many of the next generation ILSes don't even include predictive checkin. Is this development cause for concern?

Some serials librarians are clearly skeptical. The presenters provided case studies of two current generation systems that do not include predictive checkin: ALMA and Kuali OLE. The upshot seems to be that losing predictive checkin is not the end of the world, and in fact can free staff time by eliminating the

need to maintain patterns. Staff will still need to catch missing issues and claim when needed.

Boston College has been an ALMA development partner since 2009 and was the first institution to migrate to ALMA, in June 2012. ALMA is a workflow-driven solution that focuses on unified resource management of all of a library's resources, regardless of format or location. Access is browser-based and is provided by a discovery layer (Primo) that sits on top of the URM (Unified Resource Management). ALMA can handle multiple metadata formats, including MARC, MODS and Dublin Core. ALMA is cloud-based, and libraries experience less downtime due to maintenance. Ex Libris does all the maintenance, which could mean no week-long upgrade ordeals for systems librarians. ALMA also replaces individual data silos like the ILS, the Electronic Resource Management System and link resolver; all services are integrated into the one system. Young Joo Moon showed us several screen shots of how check in works and provided explanations of how ALMA handles different types of publications, like monographic standing orders. ALMA considers "serials check in" as "receiving physical items."

Boston College has found that using ALMA saves staff time, which has enabled restructuring and refocusing of staff duties.

Information about Kuali OLE was presented by Bob Pershing, a Kuali OLE developer. Kuali OLE is an open source ILS implemented at several institutions, including Duke, University of Pennsylvania, and the University of Chicago. Like ALMA, Kuali OLE is web-based. It can handle different metadata formats and is intended to handle all formats equally, with no preference for tangible or electronic formats. The serials receiving component is not fully coded yet, but Bob showed us mockups. Serials receiving is designed to be free-standing; purchase orders will not be required to track the receipt of a title.

Kuali OLE developers considered three options for serials check in: passive receipt, where you record what you get; action-date-based receipt; and full prediction

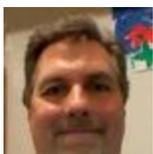
with patterns. Ultimately, the second option was chosen. Full predictive check-in was not worth the trouble for the number (which is declining) of print titles still checked in and the work involved in maintaining patterns, but a trigger for claiming was still needed.

Despite the dramatic title of the presentation, both ALMA and Kuali OLE do offer serials check in solutions that involve some prediction of when the next issue will arrive. This prediction is not based on publication patterns, but on the subscription interval of the serial and the date the previous issue was checked in. This is similar to how NOTIS and other systems worked. While many law librarians, who still deal with many print-based and complicated continuation serials, are not pleased to lose the ability to create and use complex publication patterns, other librarians in attendance expressed relief that the systems do not drop check in altogether and overall seemed pleased with how the systems handle check-in. As Bob said, "NASIG is all about therapy."

About the Presenters



Young Joo Moon, Head of Continuing & Electronic Resources, Boston College, Oct. 2009 – Present | Head of Electronic Resources & Serials Unit, Georgetown University, Jan. 2004 – Oct. 2009 | University of North Carolina at Chapel Hill, M.S. in Library Science, 2001



Bob Persing currently serves as Kuali OLE Project Librarian for the University of Pennsylvania Library. Before that, he spent 20 years in Penn's serials department -- and before that, he held the job his co-presenter has now, managing serials for Boston College. He's been coming to the NASIG conference since 1991, and has served on PPC, N&E, ECC, D&D, Bylaws, Publications/PR, indexed the conference proceedings, and been a Board member-at-large

E-Resources Acquisition Checklist: An Indispensable Tool for Managing the Electronic Resource Lifecycle

Nate Hosburgh, Montana State University, Bozeman

Reported by: Rachel A. Erb

Author Supplied Abstract: One of the core functions of the electronic resources librarian consists of managing various stages of the electronic resource life cycle. In order to do this effectively, it is extremely helpful to have a detailed guide on hand. An E-Resources Acquisition Checklist can assist the librarian in covering all aspects of evaluation, acquisition, renewal, and cancellation of e-resources such as databases, e-books, e-journals, and more. Such a tool can be indispensable, especially for new librarians attempting to get a grasp on the logistics of electronic resources management.

Inspired by the TERMS (Techniques for ER Management) wiki project initiated by Jill Emery and Graham Stone, Hosburgh organized his presentation to illustrate how an e-resource checklist can be built using the TERMS framework as a model. Hosburgh is an active participant in the TERMS project as a co-editor on the TERMS wiki.

Checklists for managing e-resources are essential for several reasons. As workflows become even more complicated, checklists organize these workflows with the goal of greater efficiency. These processes are either managed by several individuals or departments—or even both. The checklist serves to foster effective communication among all involved in these processes. In addition, the checklist helps promote responsible stewardship, allowing libraries to demonstrate that money is spent wisely. Lastly, whether e-resources processes are either ongoing or cyclical, they are clearly not linear. Checklists enable documenting iterative processes for defining workflows and evaluation of current procedures.

Hosburgh admits that he employs the term "checklist" rather loosely. One may use a checklist, but it can be in September 2013

any format that suits the needs of the organization. The medium employed does not necessarily have to be a Word document; relational databases, flowcharts, etc.-- all are acceptable alternatives. Flowcharts are especially ideal for processes that are handled across departments. Moreover, other management systems such as customer relations management systems and process management systems may also be used in this capacity instead of the ERMS (Electronic Resource Management System).

The TERMS wiki offers a visual representation of the e-resources lifecycle. The circular graphic illustrates the iterative process of e-resources acquisitions and management. Each stage was closely examined: investigating new content, acquiring new content, implementation, ongoing evaluation and access, annual review, and cancellation. The stages are described in great detail on the TERMS wiki.

The TERMS wiki is a valuable tool for not only learning about the electronic resources lifecycle but also for providing a framework for electronic resources checklists. Hosburgh encouraged the audience to consider contributing to the ERMS wiki and simply contact one of the editors to find out how you may participate in this developing project.

About the Presenter



In June 2012, Nate Hosburgh transitioned from managing Interlibrary Loan & Document Delivery at Florida Institute of Technology, Melbourne to Electronic Resources Librarian at Montana State University, Bozeman. Along with a dramatic shift in latitude, this was a shift into a different area of librarianship with unique challenges and a unique workflow. Nate hopes to share some of the experience he has gained so far as well as continue to learn from experienced professionals in the field through listservs, conferences, and other networking opportunities.

EXPO-mental Success Redux or If You Plan It, They will Come

Joann Janosko, Indiana University of Pennsylvania

Reported by: Kristin D'Amato

Author Supplied Abstract: An important aspect of the life cycle of electronic resources is disseminating the arrival of new resources on campus and reminding the campus of currently subscribed materials. A database page accessible by subject or topic or format, training sessions by vendors either live or via the web, information literacy presentations for one-shot classes or where the entire campus is invited are standard marketing strategies. However, even with clear and comprehensive presentations, demonstrating awareness of the strengths and limitations of subscribed resources, if only a handful of the 15,000+ users (on Indiana University of Pennsylvania's (IUP) campus) show up, the program may feel like an exercise in futility. Another route to disseminate this important information is the Library EXPO or Vendor Fair. Vendors set up booths for three to five hours to meet with users. They provide giveaways and help with door prizes to lure students, faculty and administrators to the fair. Users can spare a short time to browse the booths between classes and meetings to learn about new resources and ask questions about their old favorites. This program will provide insights into the planning, marketing and assessment of the Library EXPOs held at IUP.

Promoting new e-resources and highlighting subscribed material is an important part of the e-resources life cycle. In this session, Joann Janosko, Collection Development and E-Resources Librarian at Indiana University of Pennsylvania (IUP), presented the IUP Libraries' experience with holding a vendor fair. Janosko began the session by highlighting some of the traditional methods the IUP Libraries use to promote online resources, such as information literacy presentations, campus wide presentations, and vendor led training sessions. These approaches were not reaching enough people; one shot classes only connect

with a fraction of the student population and the attendance for the presentations and training sessions is consistently low. The inspiration for a new strategy sprung from a suggestion by a vendor, who had recently taken part in a vendor fair at another library. Janosko took this idea and turned it into the IUP Libraries' first Database Expo, an event that would invite several vendors to set up booths and provide presentations, offering students and faculty the opportunity to experience a number of the library's electronic resources at one convenient time.

Janosko initiated the project by making the initial vendor contacts and holding a library planning meeting. The vendors agreed to provide door prizes and help with the cost of refreshments. To help manage the process, library volunteers were matched up with vendors to help manage any matters related to the event. During the planning phase, Janosko noted that their Dean was instrumental in the success of this endeavor by involving more library personnel, agreeing to subsidize the cost of the snacks, and sponsor a vendor luncheon to thank them for their service.

The first Database Expo was held in October 2010. Eight vendors participated in the event held in the library. The event was heavily advertised, both in the library and on campus. In addition to the vendor booths, training sessions were offered throughout the day. A library table was set up to answer questions about the Expo and to manage prize entries and surveys. To win prizes, participants had to visit several booths, where vendors checked off their company on a raffle ticket. A survey was also distributed, which offered another opportunity to win an iPod shuffle. The first Library Expo drew 101 participants, including the Provost and the Director of IT. Of these participants, twenty-three took part in the training sessions.

A second Expo was held in April 2012, from 10am to 1pm, with ten vendors participating. Suggestions from the 2010 surveys helped to determine which vendors to invite. Due to the lack of participation in the first Expo, the training sessions were discontinued. Time was conjectured to be the cause of low participation rates;

patrons had the time to walk through the Expo, but not enough time to attend an hour long presentation. This time, access was restricted to the IUP community by requiring an IUP email address for the raffles. The event produced 103 participants and more positive reviews from the surveys.

The Database Expos were found to be a successful means of promoting the library's e-resources. The steady turnout and the informative feedback from the surveys encouraged the librarians to continue to employ this strategy, however, it was decided that for future events the planning would need to happen sooner and would need to involve more staff. Another goal for future events will be to increase faculty involvement. A college technology fair and new faculty orientation in the fall will offer opportunities for library participation and the librarians at IUP are planning on presenting six sessions with three vendors.

About the Presenter

Joann Janosko is Associate Professor and Collection Development/Electronic Resources Librarian at Indiana University of Pennsylvania [IUP] where she was awarded tenure in 2005. She holds an M.L.S. from University of Pittsburgh (1990). She was inducted into the University of Pittsburgh's Pi Chapter of Beta Phi Mu, the national honor society for library science, in 1990 and served as chair of Pi Chapter in 1997-8. She is also a member of ALA, ACRL, WPWVC/ACRL, LITA, NASIG, and PaLA [Pennsylvania Library Association]. During her tenure at IUP, she served as Acquisitions/Serials Librarian, during which time she automated many of the acquisition workflows to include web-based functionality: online ordering, using EDI to process both serial and monographic invoices, and implementing PromptCat MARC record delivery from OCLC, now to include e-book records. Her title eventually changed to Serials/Electronic Resources Librarian and then to her current title. During that time the e-resources offerings at IUP expanded from just under fifty to almost 300 current database titles spanning e-books, e-journals, A & I services and streaming video services. Prior to her work at IUP she served as Systems and Periodicals

Librarian at Seton Hill College in Greensburg, PA (1987-2000).

From Print to Online: Revamping Technical Services with Distributed and Centralized Workflows Models

*Christine Korytnyk Dulaney, Pence Law Library,
American University*
Kari Schmidt, American University Library

Reported by: Barry J. Gray

Author Supplied Abstract: In order to improve patron access to the library's collection of electronic resources, upgrade staff competencies for working with electronic resources, and enhance workflow efficiencies, both the Technical Services Department of American University's Pence Law Library and the Information Delivery Services division at American University's Bender Library implemented reorganizations. These two libraries, however, chose different organizational models. The law library redefined itself through a distributed model using existing staff. In contrast, the Bender Library formed a centralized Electronic Resource Management Unit to better manage access to and discovery of the electronic resource collection. The presenters will examine the successes and challenges of revising workflows, reassigning tasks, and redistributing print-based work to address the growing needs of electronic collections and diminished volume of print materials in both a centralized and distributed model. This program also provides an overview of project management techniques and how these techniques were implemented and supplemented in order to evolve the skills of the staff at both libraries. The program will also provide an overview of how a new vision and new goals were crafted; how workflows were reviewed and revised; and how jobs were rewritten and reassigned. In addition, the presenters will address shared challenges with current workflows and organizational structures. The intended audience is librarians in smaller to mid-sized libraries who do not have a librarian or department dedicated to electronic resources but who need to tackle electronic resources workflows and

evolve staff's print-based skills to accommodate electronic resource workflows.

Kari Schmidt is the Electronic Resources Librarian and Co-Interim Director for Information Delivery Services at American University's Bender Library. Christine Dulaney is the Associate Law Librarian for Technical and Metadata Services at American University's Pence Law Library. While each library operates independently, both libraries' technical services departments were recently reorganized, in part to better manage electronic resources.

In Schmidt's case, she was put in charge of a new unit, called "Information Delivery Services," that has centralized all e-resource duties separately from the rest of technical services. While she was able to hire new employees and train them to work specifically with e-resources, the proliferation of these resources has left them with the sense they cannot keep up without distributing some of the work to other technical services staff.

Dulaney compared the traditional print workflow to that for electronic resources. She characterized the former as routine, predictable and linear; while the latter is experimental, highly unpredictable, and cyclical. She adapted the engineering field's principles of project management to achieve the goals of reorganization. The highlight of her presentation was literally the unrolling a six-foot high, color-coded activity chart that allowed her department to identify duties which were not clearly assigned, as well as areas of overlapping duties.

Dulaney seems more hopeful about the success of the distributed model at her library than Schmidt is about the more centralized method. The answer to whether a centralized or distributed model is better for electronic resource management may not have as much to do with project management as do the attitudes of those currently working in technical services. Many libraries are unable to hire new staff to manage electronic resources. Therefore, they must decide to disinvest in

print serial management or invest in electronic resource management

Both Schmidt and Dulaney recognize the external threats to library technical services, especially as academic libraries redesign their space for new uses. The presenters credit their staffs with the willingness to cope with the uncertainties inherent in electronic resources. They both have tried to demonstrate the significance of what they do to the rest of the library and the campus community, so that, as Dulaney said at the conclusion of her presentation, technical services are still seen as relevant, because nobody else can handle data better than they do. Schmidt reiterated during the Q&A that we need to show the rest of the library that the work technical services does is not “mysterious.”

About the Presenters



Christine Dulaney is currently the Associate Law Librarian for Technical and Metadata Services at the Pence Law Library of American University in

Washington, DC. In both her current position as well as in her previous position as Head of Technical Services in at the Congressional Research Service of the Library of Congress, Christine has managed staff reorganizations as these library collections transitioned from print to online formats. Christine has also held the position of Head of Technical Services at Catholic University Law Library as well as Head of Acquisitions and Serials at George Washington University Law Library. In addition, Christine has published and presented at conferences on the topic of managing technical services as well as implementation of discovery layers. An active member of both ALA and AALL, Christine participates on several committees including the ALCTS International Relations Committee as well as the CONELL committee of AALL.



Kari Schmidt is currently the E-Resources Librarian & Co-Interim Director for Information Delivery Services at American University Library in

Washington, DC. In these roles she is responsible for the Electronic Resource Management Unit, Resource Description Unit, and Acquisitions Unit at the Library. Kari has extensive experience managing electronic resources. Her previous positions include Electronic Resources Librarian at the University System of Maryland as well as Collection Management and Electronic Resources Librarian for the Georgetown University Medical Center Library. As co-author of the monograph *Electronic Resource Management: Practical Perspectives in a New Technical Services Model*, as well as many articles about electronic resources and the changing nature of library collections, Kari’s expertise in this area is widely recognized.

From Record Bound to Boundless: FRBR, Linked Data, and New Possibilities for Serials Cataloging

*Marlene van Ballegoie, University of Toronto Libraries
Juliya Borie, University of Toronto Libraries*

Reported by: Heidi Berthoud

Author Supplied Abstract: As resources have become ever more complicated in a digital world, it is evident that cataloging practices and the metadata standards used to guide these practices are becoming more constrained. Nowhere is this more apparent than with the cataloging of serial publications. For librarians, serial publications have been a constant challenge due to issues such as the multiple version problem, frequent changes in title or issuing body, and complex publication histories. For users, serial publications are challenging due to the boundary that has been established in the library profession where serial publications are described by librarians, while the articles contained within those publications are handled by indexing and abstracting services. Although web-scale discovery systems have attempted to bridge the gap by providing a single point of discovery, user access is far from seamless. Recent changes within the library community can have a significant impact on serials cataloging and may help improve information retrieval for the end user. The Functional Requirements for Bibliographic Records (FRBR) holds great promise for

alleviating some of the problems related to serials cataloging. While FRBR provides a useful mechanism for re-examining many of the problems with serials cataloging, the principles of Linked Data may further transform the way in which resources and the relationships between them are captured and presented to our users. By taking description out of current record constraints, serials librarians will better be able to express how a particular journal has changed over time and the relationships between multiple versions of the same publication. The Linked Data model also opens up many opportunities for the provision of value-added content to bibliographic descriptions. Shifting description to a Linked Data model may not only help to alleviate many of the issues related to serials cataloging, it can also help users better understand and use bibliographic data effectively.

Marlene van Ballegooie and Juliya Borie of the University of Toronto presented “From record bound to boundless: FRBR, linked data, and new possibilities for serials cataloging.” Van Ballegooie and Borie describe the current “record-bound” world of serials cataloging, which is sadly out of sync with the FRBR entity model. Some of this disconnect is due to the limitation of the MARC schema. MARC records are static and inflexible; they cannot adequately describe relationships between FRBR groups and entities, and semantic meaning can only be derived within the context of the whole record. Some of this disconnect also stems from difficulties in modeling challenges faced when mapping serials onto FRBR.

However, it is not just FRBR that is revealing weaknesses in this current record-bound system. Technology is racing ahead, and MARC records cannot keep pace. The woes of the record-bound state can be illustrated by the difficulties in finding serial articles using current discovery tools. Van Ballegooie and Borie point out that this is because there are two levels of metadata at work here: the serial level metadata, encapsulated in our MARC records, and the article level metadata, provided by abstracting and indexing tools. These two levels of metadata don’t always work well

together and the connections between one level and another are often unclear.

Van Ballegooie and Borie point to the Library of Congress’ Bibliographic Framework Initiation (Bibframe), and how it enables a complete reimagining of the bibliographic environment in a post-MARC world. Bibframe is relatively new and not without its own challenges, but the possibilities it offers could provide a number of benefits both for librarians and patrons. Instead of storing data in a static record, Bibframe leverages semantic web technologies to expose data using a linked data model. Because linked data does not exist in a closed system but is essentially “boundless,” it better realizes many of the aims of FRBR, particularly in its ability to make connections and relationships between entities. Van Ballegooie and Borie predict the shift to linked data from MARC could either solve or clarify a number of problems currently faced when describing serials, including the journal/article divide, clear linking of publication history, and clear descriptions of multiple versions. The presenters describe this shift as moving from cataloging to “catalinking.”

The use of linked data in serials cataloging also has added benefits for patrons. Van Ballegooie and Borie posit that linked data, and the rich relationships it enables, will allow patrons to find more resources serendipitously, as collections will be more visible, discoverable and much less siloed. Leveraging web technologies will also provide catalogers new opportunities to link from titles to supplementary web materials, like data sets and multi-media supplements.

About the Presenters

Marlene van Ballegooie is the metadata librarian at the University of Toronto Libraries. She received her MIST degree at the Faculty of Information Studies, University of Toronto. Marlene has written several articles and presented at conferences on the topics of library metadata, digital collections, and the semantic web. Her primary research interests include: Linked Data,

metadata interoperability, and methods and tools for automated metadata generation.

Juliya Borie is a cataloguing librarian at the University of Toronto Libraries. She holds an Honours BA in French and English, a B.Ed from York University (Toronto) and a MIST from the University of Toronto. She specializes in providing access to serials as well as monographs in Western European languages. She also contributes to reference services at the Robarts Library at University of Toronto. Her research interests include cataloguing training and users' information-seeking behavior.

Fundamentals of E-Resource Licensing

Claire Dygert, Florida Virtual Campus

Reported by: Jeanne M. Langendorfer

Author Supplied Abstract: This program will explore the role of license agreements in the e-resource environment, and detail best practices for creating agreements that protect the rights of users and libraries. Following a discussion of the legal framework for licensing, the session leader will walk the attendees through a typical license agreement and discuss the issues that various sections and clauses may present, including those that might be encountered in a consortial vs. single institution environment. The "Florida Virtual Campus Guidelines for E-Resource Licensing," developed in conjunction with an intellectual property specialist lawyer at the University of Florida, will serve as a backbone to this discussion. The session will close with some practicalities for reviewing and editing license agreements, creating schedules and addenda that cover additional terms and requirements not generally part of a standard agreement, and tips for successfully negotiating terms with vendors.

This program covered basic best practices for creating or amending license agreements for electronic resources that protect the rights of users and libraries. Claire Dygert, Assistant Director for Licensing and E-Resources, Florida Virtual Campus, presented key

components of a license agreement, including sample clauses that draw upon the *Florida Virtual Campus Guidelines for E-Resource License Agreements*.

https://fclaweb.fcla.edu/uploads/FLVC_Licensing_Guidelines_Version_III_Final.pdf

To ground our understanding of the need for well-written license agreements, Dygert briefly explained U.S. Copyright Law; the First-sale Doctrine that lets libraries lend, sell, and discard material; and Fair Use that allows for reproduction of a work for specific uses as well as the four factors that must be considered to meet the guidelines of Fair Use, and the exceptions allowed for libraries.

Contract law takes precedence over the existing rights and exceptions granted by Copyright Law. Therefore, it is critical to shape license agreements that protect users and libraries by retaining rights and exceptions allowed in Copyright Law. License agreements define the terms of the use that can be made of the resource and the obligations of the licensee and licensor.

Dygert encouraged attendees to not be afraid, intimidated, or hesitant when approaching licensing workflows. Each library should develop local licensing guidelines by considering your library's needs and by consulting the work of others. Requesting an editable copy of the license agreement early in the acquisitions process is advisable and it is important to comport yourself as though your changes to the agreement will be accepted by the vendor.

Develop a support network of local expertise. The experience and knowledge of staff in your institutional purchasing office and office of legal counsel may be particularly valuable. Help educate those who sign license agreements to understand the critical library issues that are part of a license agreement. Use the LIBLICENSE listserv, a forum for discussing licensing issues, as it is a great source for providing information about licensing. <http://liblicense.crl.edu/>

The major part of the presentation described the anatomy of a license agreement. Dygert reminded participants to work with your office of general counsel (or other appropriate authority) so that your license agreements represent your institution in the way your institution wishes to be represented. Typical parts of a license agreement include a description of “licensor” and “licensee,” a glossary of terms, definitions of authorized users, authorized site, authorized uses, licensor responsibilities, licensee responsibilities, and mutual obligations, legal issues (governing law, indemnification, etc.), and schedules and amendments.

The audience was reminded to consider SERU (Shared Electronic Resource Understanding) instead of traditional license agreements.

<http://www.niso.org/workrooms/seru>

To wrap up the presentation, Dygert offered some negotiation tips. Help your colleagues and your administrators understand the process and set your expectations high. Always be aware of deal-breakers and use them to help you get the resources needed for your users. Lastly, refer back to established guidelines and practices to help you make the case that your needs reflect the practice and policy of the institution.

About the Presenters

Claire currently serves as Assistant Director for Licensing and E-Resources for the Florida Virtual Campus (FLVC). Claire’s responsibilities include licensing and managing the FLVC funded databases licensed on behalf of the eleven state universities and twenty eight colleges of Florida, as well as negotiating e-journal packages and other shared e-resource deals paid for by the libraries themselves. One of Claire’s major efforts has been working with the Independent Colleges and Universities of Florida and the Florida College System to build collaborative licensing efforts various educational systems in the state. Prior to coming to FLVC, Claire worked at American University in Washington DC where she served as Department Head for E-resources and Serials. Claire’s current professional activities include serving on the editorial board of the Journal of

Interlibrary Loan, Document Delivery and Electronic Reserve, and as a board member of the Florida Chapter of the Association of College and Research Libraries.

Getting to the Core of the Matter: Competencies for New E-Resources Librarians

*Roën Janyk, Okanagan College
Emma Lawson, Langara College*

Reported by: Heidy Berthoud

Author Supplied Abstract: As the amount of content created and acquired in electronic format continues to increase, establishing the knowledge and skills necessary for the job is essential for electronic resources librarians. New librarians are entering this emerging field, but are they well equipped to perform the duties of an electronic resources librarian? Two librarians share their experiences transitioning from the world of library school to applied work experience as electronic resources librarians. What gaps arose in their knowledge, and what training could have been useful? Using NASIG's Core Competencies for Electronic Resources Librarians as a guide, the presenters will discuss what they learned in library school, what they learned on the job, and how library schools and organizations can better prepare e-resources librarians for the future.

Roën Janyk, web services librarian at Okanagan College, and Emma Lawson, electronic resources librarian at Langara College, presented “Getting to the core of the matter: competencies for new e-resources librarians.” Janyk and Lawson began by introducing themselves and briefly discussing their various job responsibilities, including acquisitions, licensing, negotiation, access, troubleshooting, knowledgebase management, holdings, record batch-loading, and many other areas. Janyk and Lawson then spoke about each of the NASIG Core Competencies for Electronic Resources Librarians in-depth, demonstrating what job tasks matched up with each competency, what coursework they had completed to support each competency in library

school, and what, if any, roadblocks existed that affected mastery of each competency.

After reviewing each competency, Janyk and Lawson made a number of recommendations on how to better prepare new e-resources librarians. Many of these recommendations pertained to relevant library school coursework, as Janyk and Lawson highlighted a disconnect between coursework and the day-to-day tasks of many e-resources librarians. These recommendations included more hands on activities, possibly through partnerships with library schools and vendors, constant curriculum evaluation to make courses current and relevant, more teaching of relevant technologies, or publicizing of useful courses in other departments, more courses geared specifically toward e-resources management, licensing, contracts, negotiations and vendor relations, and more collection development courses that were specific to selecting and curating e-resources. Janyk and Lawson also called for several changes that can be promoted by e-resources professionals, such as cross-training in the workplace, promotion of e-resources as a career path, and more e-resources professional opportunities at conferences.

About the Presenters



Roën Janyk is the web services librarian at Okanagan College in Kelowna, B.C. She received her MLIS three years ago from the iSchool at UBC.



Emma Lawson is the electronic resources librarian at Langara College in Vancouver, B.C. She received a MA from the University of Toronto in 2008 and a MLIS from the iSchool at UBC in 2010.

Library Reorganization, Chaos, and Using the Core Competencies as a Guide

[Clint Chamberlain](#), *University of Texas at Arlington*
[Derek Reece](#), *University of Texas at Arlington*

Reported by: Heather Barrett

Author Supplied Abstract: Starting in the fall of 2012, the University of Texas at Arlington Library began planning a massive reorganization that would ultimately affect all areas of the library. This reorganization would change staffing levels, departmental structures, and job descriptions. During this time of change, the librarians and staff who worked with electronic resources used the Core Competencies document as a guide, both for training new staff and for making sure that the existing e-resources team didn't lose direction as change swirled around us. In our presentation, we will discuss how the team functioned prior to the reorganization, how we used the Core Competencies document as a guide to help ensure the team that emerged on the other side of the reorganization process was staffed with members who possessed all or most of the core competencies listed, and how the Core Competencies helped us guide the new team in developing needed skills and abilities. We will document the process, assess staff about e-resource competencies both before and after the reorganization, and present our findings.

Clint Chamberlain and Derek Reece spoke about NASIG's draft of The Core Competencies for Electronic Resources Librarians and their usefulness during UTA Library's current re-organization. Chamberlain and Reece, along with several library assistants, made up the library's serials and electronic resources team, one of many teams in an organizational model that has proven to be disjointed and inefficient. Despite discussion between teams, Chamberlain, Reece and their staff were often the last to learn about changes that heavily impacted their team, such as changes with the library's link resolver and proxy server. A "library expo" held early in the re-organization process, in which staff from each area gave a presentation on what they

do, revealed that many staff had no idea what colleagues in other areas were doing.

The new dean of the library saw that a comprehensive re-organization of library staff and job positions was in order. The re-organization would affect all areas of the library and all staff apart from the dean, and the dean would make the final decisions about positions and staffing. In order to ease staff anxieties, each person was allowed to identify areas in which they were or were not interested.

A large part of the re-organization has been based on an inventory called Knowledge, Skills, Abilities, and Passions/Preferences (KSAP), which is used to better match staff aptitudes with positions. Chamberlain and Reece found that KSAP leaned heavily toward public service skills, so they used the NASIG draft core competencies to develop additional inventory items that would ensure that serials and electronic resources skills would be covered. Whenever possible, existing inventory items were mapped to the draft core competencies. Chamberlain and Reece found that it was helpful and more persuasive to the dean and other staff to base their recommendations and justify their needs upon an objective outside source.

Chamberlain and Reece reported that the KSAP results were still being analyzed and they were still not sure what their own positions would be or whether their serials and electronic resources team would remain unchanged. An ideal outcome would be an electronic resources team fully integrated with acquisitions teams, cataloging, and digital initiatives. They expect that there will be better and increased communication about electronic resources among all the stakeholders and that all team members will participate in communication, rather than just the team leader. They plan to use the core competencies as a basis for staff performance evaluations and assessing staff development needs, as well as for educating colleagues who are not familiar with serials and electronic resources.

About the Presenters



Clint Chamberlain has been an active member of NASIG since he was a student travel grant recipient in 2000. He has been the Coordinator for Information Resources at the University of Texas Arlington since 2010, where he oversees collection development, acquisitions, and preservation units.

Since earning his MS in Library Science from the University of North Texas, Derek Reese has been a librarian at UT Arlington. He started as a Metadata Librarian in the cataloging department before moving to Information Resources, where currently his title is Continuing Resources and Information Content Librarian.

LibX: The Small but Mighty Button for E-resource Discovery and Access

[Galadriel Chilton](#), University of Connecticut
[Joelle Thomas](#), University of Connecticut

Reported by: Heather Barrett

Author Supplied Abstract: LibX is an open source browser extension (project site: <http://www.libx.org/>) that pushes access to a library's e-resources and services out to users wherever they are on the Internet (e.g. Amazon, Wikipedia, etc.). Once installed in Firefox or Chrome, LibX appears as a button in the upper-right corner of a user's browser window (<http://screencast.com/t/BNultuTGhWd>) and its functionality includes: a search box for library resources, links to library services, dynamic links back to targeted library holdings information for citations and books found on freely web sites, and a "reload current page with EZ Proxy" option for easy off-campus authentication. In Fall 2012, University of Connecticut (UConn) Libraries unveiled their instance of LibX along with homegrown user guides and instructional materials as well as targeted marketing and promotion efforts such as ad campaigns, short promotional videos, flash drives, and a "How Has LibX Helped You" contest.

For the contest, people were invited to submit a 100 word statement about how LibX helped them. The goal is to promote LibX, but also gain insight on how LibX is being used and what features users of LibX found most helpful. This presentation will describe the successes and challenges of UConn's LibX implementation and promotion, as well as an analysis LibX usage as self-reported by users.

Galadriel Chilton and Joelle Thomas spoke about LibX, a free add-on for Firefox and Chrome browsers which links information on external websites to the same information in a library's website, discovery systems, or subscribed databases. Chilton and Thomas realized that library users rarely begin their online searches through the library's web resources, opting instead for external sites such as Google, Amazon, and Wikipedia. They wanted to find a way to break down the walls between the library website and external sites and make library data easily accessible where users search for information on the open web.

LibX acts similarly to a link resolver: whenever it finds a piece of bibliographic information such as a book title, article citation, ISBN or ISSN, at an external site and links back to library subscribed content. Chilton and Thomas noted that setting up their LibX instance was pretty quick and easy, although setting it up for EBSCO databases took longer. They ran into some problems with Google Chrome and Wikipedia due to changes made by those organizations, but they were resolved. The staff at LibX has been very responsive to email and there is also a listserv available. LibX is not available for Internet Explorer and that is not likely to change.

A potential drawback with LibX is that it might easily be missed. Users have to know it is there and know how to use it. Accordingly, Chilton and Thomas planned an extensive marketing campaign to promote LibX. They created posters, held a contest in which users would tell how LibX had helped them, offered promotional giveaways, and created a LibGuide for users. They installed LibX on all of their library computers and librarians included it in their bibliographic instruction classes, as well as encouraging users to install it on their

own computers. They also held workshops and demonstrations for faculty and subject liaisons. They do not have exact statistics on how many patrons have installed LibX, but they have received positive feedback to their marketing efforts. Faculty have been especially positive and appreciative of the service. They have also reported an increase in traffic on their library website.

About the Presenters



Galadriel is the Electronic Resources Management Librarian at the University of Connecticut where she continuously seeks ways to push access to paid e-resources into users' native online habitats. She has a Master of Library Science from Indiana University and a Master of Education in Instructional Design and Educational Technology from San Diego State University.



Joelle Thomas is the Undergraduate User Experience & Media Technologies Librarian at the University of Connecticut, where she works to improve users' interactions with library spaces and services, both virtual and physical. She has a Master of Library Science from Kent State University.

Losing Staff: The Seven Stages of Loss and Recovery

[Elena Romaniuk](#), *University of Victoria Libraries*

Reported by: Marsha Seamans

Author Supplied Abstract: During the past 12 months, the University of Victoria Libraries said good bye (due to retirement) to both of our serials catalogers. Due to impending budget cuts, we were not able to advertize either one of these vacant positions. This session will address the approaches taken and the strategies implemented in coping with the loss of these two highly experienced and highly trained staff members. By applying the skills and abilities in the

"Supervising and management" core competency, we are implementing changes that will, in the long term, allow us to continue to provide high quality service to users.

Applying the "Seven Stages of Grief" to the loss of staffing at the University of Victoria Libraries, Elena Romaniuk outlined the steps that were taken to cope with multiple budget cuts, loss of experienced staff, reorganization, and realignment of responsibilities. Approximately twenty librarians in technical services in the 1980s have been reduced to four, with similar reductions in support staff. In addition, the serials department recently faced two retirements.

The seven stages of grief are: 1) shock and denial; 2) pain and guilt; 3) anger and bargaining; 4) depression; 5) upward turn; 6) reconstruction; and, 7) acceptance and hope.

The "shock and denial" stage was characterized as "numbed disbelief, while "pain and grief" were reflected in the loss of friends and coworkers. The remaining staff found that they had lost resource people; they lost the knowledge, experience and institutional memory that those people carried. Additionally, their workload increased. In the "anger and bargaining" stage, the staff found that they could not really be angry at their coworkers for being able to retire. The department head considered requesting one position to be filled, but found that it was not an option.

The "depression" stage was refocused on reflection regarding how the work had changed over time, what was needed to do the work, and how the remaining staff could help. The work had become much more complex and diverse, partly due to large special collections gifts. There was less low-level work and more high-level work, and there were much fewer active serial print titles. In order to get the work done, staff at higher skill levels was needed, but hiring additional people was not an option. The existing serials staff held extensive experience and was familiar with records, processes and routines, and was very willing and able to be trained in new tasks. The result of this

reflection was to reassign work to remaining staff, rewrite job descriptions, fill out job questionnaires, and implement an extensive training program.

The "upward turn" came from the approval to go forward with the plan. Job descriptions were rewritten and jobs were evaluated. One-on-one cataloguing training was begun, and group training meetings were booked in advance to cover concepts, policies and problem solving.

The "reconstruction" and "acceptance and hope" stages are ongoing. Training was started in April 2012 and staff is cataloguing with ongoing record review. Priority and goal setting is also ongoing, with one decision being to postpone implementation of RDA. Staff in the department has both acceptance and hope, at least for now, and they are willing, capable, and cooperative with the changes and acknowledge that though backlogs may grow, their work will get done. They are waiting to hear how jobs will be reclassified. Romaniuk talked about what worked in their favor, what coping strategies were used, and some of the challenges they encountered, as well as future plans. They had time to ponder and evaluate options, prepare documentation, and do some training before experienced staff retired. They were also fortunate to have administrative support.

As a supervisor, coping strategies included being available to staff, providing ongoing problem-solving help, clarifying priorities, documenting procedures, and providing reassurance that it was okay to take time to learn and consult. Challenges included the need to provide more training, underestimating the time needed for problem-solving, multiple simultaneous demands, and always too much work. The merger of the law library's technical services into the department also introduced additional challenges.

For the future, Romaniuk continues to ponder the situation and to analyze where help is needed. She has written a proposal for an additional librarian position. Considerations include a possible reorganization and/or

requesting help from another area, possibly from cataloging.

About the Presenter

Elena Romaniuk has worked as a Serials librarian since 1984, starting out as her career as a serials cataloger by taking on the responsibility for cataloging IEEE serial publications. Elena later took over the responsibility for the bibliographic unit responsible for cataloging serials in all formats and eventually became the Head of Serials Services at the University of Victoria Libraries.

Realizing the Value of Non-purchased Content

Elyse Profera, Taylor & Francis Group

Meg Walker, Taylor & Francis Group

Reported by: Linh Chang

Author Supplied Abstract: Taylor & Francis would like to present on the challenges librarians face in helping their users to understand and realize the value of the increasing quantity of content that is freely available to read, including open access journals, repositories, blogs and wikis. On helping users to navigate this content, librarians often have no 'ownership' in the traditional sense of library acquisition and often no usage statistics by which to gauge relevance. The basis of this presentation would be a white paper, currently in progress, that investigates the issues and challenges that libraries have in realizing the value of the content that they do not purchase. The hypothesis of the research is that users are increasingly overwhelmed with content and find it difficult to navigate effectively through what is available and then apply it in their research, studies or teaching. We want to start a debate on next generation publishing activities to start solving some problems by, for example, providing content in more navigable, flexible, digestible formats. As a publisher, we want to provide help and support for librarians in the challenges that they face navigating non-purchased content.

The presentation was based on an extensive research project that Taylor & Francis conducted over the past eight months regarding the exponential growth of free online resources and their value for teaching, learning and research purposes, as well as the many challenges they bring to both librarians and their user communities. The importance of these free resources and the issues relating to their discoverability prompted T&F to have the results of the study written up into a white paper entitled "Facilitating access to free online resources: challenges and opportunities for the library community." The audience was encouraged to review the paper at <http://www.tandf.co.uk/libsite/pdf/TF-whitepaper-free-resources.pdf> and provide feedback.

Profera began the session by explaining why T&F undertook this research: because they wanted to explore issues relating to discoverability of free content, to identify the challenges facing librarians in providing access to free online resources, and to help librarians in their quest for facilitating discovery. Next, the presenter provided an overview of the methodology T&F used to conduct their research. It included distributing questionnaires to several focus groups, Tele-depth interviews, and an online survey. She then gave a brief summary of the research objectives for the project, which included defining types of non-purchased content, understanding how librarians help users recognize quality and relevant non-purchased resources, identifying problems associated with using non-purchased content, and exploring next-generation publishing efforts.

The presenters provided an in-depth discussion on the primary findings of the research's seven key themes.

The Growth and Value of Free Content

The research findings in this category showed a rapid growth of free articles available via traditional open access. In 2000, there were about 19,500 articles published as open access, but by 2009, the number of open access articles had increased to 191,850. In addition, the number of repositories providing free access had grown to over 3,340. There are, of course,

other types of free content ranging from podcasts and videos to presentations, blog entries and wikis. Given this dramatic increase, the question arises: how do librarians sift through all of this information to determine the quality and relevancy of the material to help their patrons? When the survey asked faculty to rate the importance of free content for their research and teaching, over 60% rated it as “very important,” while 53% of the librarians surveyed also strongly agreed that free online resources add value to the research process. In addition 59% of librarians agreed that user-generated content such as discussion forums and social media sites will become more important for all subjects in scholarly communication.

Resource Challenges for Libraries

How much effort should librarians spend on selecting and managing free online content that the institution doesn't own? And how much cataloging time is devoted to facilitating discovery of free e-resources as opposed to paid resources? The survey revealed that whereas 84% of respondents said 10% or less of their time is devoted to cataloging free content, 83% of respondents agreed that investing more resources in providing better metadata for this type of content would benefit their institution.

Identification and Selection of Content

Lack of metadata generally makes the discovery of free online resources very difficult and unpredictable. Also, identifying access rights, whether access to content will be permanently free or free only for a limited time, and what the license terms for that content are, can be difficult and time-consuming. The presenters felt this explains why many librarians find, for example, T&F's Gold Open Access journals a useful type of free online content. In the survey, 67% respondents said they favored of this type of content because of its perpetual free online access.

The Role of the Library

The main challenge faced by librarians in selecting and evaluating appropriate resources and making them discoverable was primarily a lack of human resources. The survey revealed that while the majority of librarians feel they have primary responsibility in selecting and identifying relevant online content for their users, they also saw faculty as having some level of responsibility along with perhaps some other users. The presenters felt the idea of distributing some of this workload to faculty members seems like a practical way to bring in subject expertise to help librarians evaluate free online content. On the other hand, publishers are viewed as being less useful in this effort. The survey asked librarians how they make online content visible to users. 63% respondents said they provide links to free content from the library's website, 53% promote the use of Google or Google Scholar, 48% index free content in the library's catalog, 42% incorporate free content in federated/discovery search tools.

Information Literacy

The survey findings in this area show librarians are making efforts to collaborate with faculty members to provide training to increase user information literacy skills. Getting faculty to share their subject expertise in this endeavor with the user community along with the work of librarians is key not only in helping making content more discoverable, but in helping the user community learn how to distinguish which free online resources are most trustworthy.

User Needs and Expectations

Part of the challenge in this area is ensuring the library discovery service is robust and the interfaces are user-friendly in order to enhance the user's research experience. Many libraries have already made improvements to the user interfaces of their discovery services and ensure that they facilitate access to content beyond the library's subscribed collection. Librarians also need to use their abilities to find innovative ways to provide personalized services and

eliminate what may be the all-too-common result of users choosing ease of access over quality.

Furthermore, it is essential to make the library a fun place for users to visit where they will encounter success in finding what they need.

The Role of Publishers

The survey showed that librarians have split views on the role of publishers, and many feel they could do more to solve some of the problems around the issue of discoverability. With that said, many commercial content providers can and do help by providing better metadata and quality content. They collaborate with their user community to identify and help resolve the challenges we all face as free online resources continue to grow along with their importance to higher education, teaching and research.

The presentation concluded with recommendations for librarians, aggregators, technology partners, and publishers. For librarians, their recommendations were to invest more resources in relevant free content, promote the librarian as the facilitator of discovery, find ways to enhance discoverability through developing research methodology, better discovery systems, better evaluation and presentation of the materials, and personalization of the library services. This same set of recommendations also applies to the aggregators and technology providers with the addition of better indexing, faster and easier to use discovery systems, standardized bibliographic metadata, and trusted repositories of links and contents. For publishers, the priority is to make content permanent and discoverable, to adopt open access metadata standards, ensure permanent access and reliable archiving of these materials, ensure that publicly-funded research is freely available, improve integration on link resolver, and provide usage statistics for free content materials.

About the Presenters

Elyse joined Taylor & Francis Group as Associate Library Marketing Manager in July 2012. She is currently responsible for managing all library marketing activities

for North and South America. Prior to this, Elyse worked for Synogy, Inc., the largest provider of sales performance management software and services, as its Marketing Manager, Vertical Markets, and Swets, a leading information services company, as its Marketing Communications Manager. Elyse received her MA in Public Relations from Rowan University, and BA from Saint Joseph's University. She has been published in *Serials Review* and *Information Today*.

Scholar Commons @ USF: Sharing Knowledge Worldwide

*Carol Ann Borchert, University of South Florida
Julie Fielding, University of South Florida*

Reported by: Paula Sullenger

Author Supplied Abstract: Librarians and faculty members now have the opportunity, through open access publishing, to work together to make faculty-produced scholarly content available to the entire academic community, not just to those scholars or institutions privileged enough to afford it. The University of South Florida Libraries have been working with bepress' Digital Commons platform to create a substantial institutional repository that includes open access journals, conference proceedings, and data sets, among other materials. Publication of open access journals at USF officially began in 2008 with the launch of Numeracy from the National Numeracy Network. Library staff members are currently involved in a variety of activities, including negotiating memorandum of understandings, loading back files, registering DOIs with CrossRef, designing layout, doing final publication steps, and assisting with technical issues. In 2011, our institutional repository, Scholar Commons @ USF, went live, allowing the library to pull fragmented collections previously hosted on other platforms into a single system with improved discoverability. This session will discuss some of these efforts, what is involved, how we have retrained existing and new staff, and plans for future directions.

We are seeing more and more libraries take on the role of scholarly publisher. Carol Ann Borchert & Julie Fielding talked about what goes on in the library to create a successful open access publishing venue. The Scholar Commons at USF is more than a digital repository; it hosts 12 open access journals.

The USF library administration has a commitment to open access and expanded existing relationships on campus to get its journal publishing program off the ground. They saw opportunities for small journals with a narrow focus that might not survive commercially. They marketed the program's benefits to editors and authors as providing freely available online content with professional design.

USF created two new positions to work with Scholarly Commons on a part-time basis. Bepress trained these new hires in layout, DOI registration using XML files, and using the administrative side of Digital Commons. USF then embarked on an extensive campus outreach plan, including a university-wide press release, attending the Council of Deans meeting, departmental visits, building on existing faculty-librarian relationships, and hosting an Open Access Week event.

Borchert and Fielding described the intensive work required when a journal proposal is accepted. After a Memorandum of Understanding is signed, the long process of journal design begins, with the editors choosing logos, colors, banner, and the general look of their journal. When this is done and a demo site has been set up, the editors receive training from bepress and prepare for their journal launch. Borchert and Fielding have found that a general call for papers for an unknown journal doesn't work and launches are much more successful when the editors have a clear plan, such as starting with conference proceedings or with a special issue with a well-known guest editor. This process has led to twelve current open access journals hosted by the Scholar Commons with two more in the implementation phase and five open-access textbooks.

The USF librarians feel that their project is a success. One article from their *Journal of Strategic Security* has been downloaded more than 5,000 times. *Studia*

Universitatis Babeș-Bolyai, Geologia, previously a print subscription-based journal, has seen usage increase nearly 90% since it became an online open-access journal. *Numeracy* has had more than 39,000 downloads of its 95 articles.

This success is not without cost. The staff is operating at or beyond capacity and they are seeing increasing demand for their services. The repository is funded with soft money from the university foundation and does not have permanent funding. An audience member questioned the cost of being publishers vs. the cost of buying a subscription. The USF librarians feel that their efforts are part of giving the library a bigger footprint on campus and making them more necessary to the faculty.

About the Presenter



Carol Ann Borchert has been the Coordinator for Serials at the University of South Florida (USF) since 2004.

Previously, she was in the Reference and Government Documents departments at USF, and in several areas of the James B. Duke Library at Furman University. She holds an MLS from the University of Kentucky and an M.A. in Spanish from USF.



Julie Fielding has been a Library Operations Coordinator at the University of South Florida (USF) since August 2011, working with electronic resources and

open access journals. Before this, she was an Information Services Associate at Gale Cengage Learning. She holds an MLIS from Wayne State University in Detroit, Michigan.