



# The CHARLESTON REPORT

## *Business Insights into the Library Market*

MAY / JUNE 2010

VOLUME 14, NO. 6

### **Libraries on the Move**

Google has digitized the Scripps Institution of Oceanography Library, the world's largest oceanography library. The digital materials include books, journals, and expedition reports dating to the 18th century. *Press Release*, May 20, 2010, <http://scrippsnews.ucsd.edu/Releases/?releaseID=1073>.

The New York Public Library has partnered with Hathi Trust to add its digitized books to the Hathi Trust collection. The NYPL is the 27th library to join the partnership. *Press Release*, May 24, 2010, <http://www.nypl.org/press/press-release/2010/05/24/nypl-takes-giant-step-preserving-its-digitized-collections>.

The Welch Medical Library at Johns Hopkins University is moving its 10 clinical and public health librarians from serving as liaison librarians for their assigned departments toward becoming embedded informationists within those departments. The embedded informationist service model comprises customized information services delivered at the researcher's location and at points of research, teaching, and clinical care. The embedded model enables the informationists to answer questions faster, to fill information needs more effectively, and to act as information experts on research and care teams. *Welch Medical Library*, June 2010, [http://www.welch.jhu.edu/liaison/about\\_liaison.html](http://www.welch.jhu.edu/liaison/about_liaison.html).

### **Just Say No**

The University of California system has informed the Nature Publishing Group that if they won't negotiate the proposed 400% increase for the cost of California's license for its journals next year, the system will take steps against the publisher, which may include suspending subscriptions to all of the Nature Group journals the system buys access to. The system would also organize a boycott of Nature's journals to include a voluntary request to all UC researchers to neither contribute papers to nor review manuscripts for the Nature Group journals. *The Chronicle*, June 8, 2010, <http://chronicle.com/article/U-of-California-Tries-Just/65823/>.

### **Report from UKSG's 33rd Conference and Exhibition**

*... Reported by Rebecca Lenzini, Editorial Board Member, TCR <[rlenzini@earthlink.net](mailto:rlenzini@earthlink.net)>*

UKSG's 33rd Conference and Exhibition took place April 12-14, 2010 at the Edinburgh International Conference Centre in Edinburgh, Scotland. The event was very well attended with 845 delegates, a record high for the organization and a 10% improvement over the 2009 figure. The conference welcomed attendees from 29 countries (5 continents) as well as 70 exhibitors and 24 sponsors. John Merriman, formerly of Blackwell's and the originator of UKSG, was honored at the start of the conference. He reminded the audience that Robert Maxwell was the guest speaker for the 1st conference in 1975 which was attended by 69 individuals. UKSG remains true to its goal, according to Merriman, who said the notion was to keep all partners in the information and serials chain as equals — no separate badges, no separate status.

As part of Plenary Session 1, Richard Wallis of Talis in his talk on "Technology and Change" reminded us that calculators in 1973 cost the equivalent of a Kindle or iPad now. Wallis advocates re-orienting the university around the student, pointing out that users start at Google and want to get to answers as quickly as possible with as few barriers as possible, where barriers include introductory screens. He noted that search services are powered by metadata and that library metadata is not "in sync" with the larger world of information. My favorite quote from this presentation: "They won't come just because you build it."

Next up in the session was Adam Bly, in a true "new age" paper on the topic of "Re-architecting Science: A Vision for STM in the 21st Century;" "new age" since he was presenting his slides remotely from his New York office and advised us to follow along on Twitter. In order to meet the primary needs of researchers, Bly noted that science is increasingly international and data driven. He pointed to the multidisciplinary nature of information use and noted that the research community is frustrated by the current IT-driven world, preferring a "purpose driven and purpose built" environment. He advocates "re-booting" our current approach to information and the web around a digital core with a free flow of information based on standards and interoperability aimed at creating knowledge from information, all of which allows "conversations" that feed back to Open Access journals.

The final speaker of the opening session was Conrad Wolfram of Wolfram Alpha whose approach injects human expertise on top of a mathematical foundation to create "linguistic processing" and provide answers, not just information. He noted that the Wolfram Alpha API is available for adoption to eBooks and other publication formats and welcomed the audience to give the search engine and approach a try.

This brief summary is just the start. To read more about the many other fascinating UKSG sessions, be sure to log on to [http://liveserials.blogspot.com/2010\\_04\\_01\\_archive.html](http://liveserials.blogspot.com/2010_04_01_archive.html).

And mark your calendars for next year's conference which will be held at Harrogate, Yorkshire, UK, from April 4-6, 2011 <http://www.uksg.org/events/annualconference>.

## Short Takes

Amazon has filed a lawsuit against the North Carolina Department of Revenue because of its demand that Amazon turn over the names and addresses of all residents who made purchases from them since 2003. The original request by North Carolina is part of that state's efforts to collect sales tax on items purchased by North Carolina residents from Amazon. In the complaint, Amazon also said North Carolina is demanding it turn over records of what customers purchased and how much they paid. When North Carolina first announced its plans to collect sales tax from online retailers, Amazon closed down its affiliates program in the state, arguing that without the program, the state had no nexus to collect sales tax. *Publishers Weekly*, April 20, 2010, <http://www.publishersweekly.com/pw/by-topic/industry-news/publisher-news/article/42917-amazon-sues-north-carolina-over-demand-for-customer-records.html>.

Six U.S. Congressional representatives introduced the U.S. Federal Research Public Access Act (FRPAA, H.R. 5037) in the House of Representatives on April 15, 2010. The bill would essentially extend the NIH Public Access Policy that ensures that the public has access to the published results of NIH-funded research across all the major funding agencies in the U.S. federal government. *SPARC Open Access Newsletter*, Issue #145, May 2, 2010, <http://www.earlham.edu/~peters/fos/newsletter/05-02-10.htm>.

UKSG and NISO announced that the American Institute of Physics, Ex Libris, Serials Solutions, and OCLC are the first organizations to publicly endorse the Phase I recommendations of the KBART (Knowledge Bases And Related Tools) Working Group, a joint initiative that is exploring data problems within the OpenURL supply chain. KBART's Phase I Recommended Practice (NISO RP-9-2010), published in January 2010, contains practical recommendations for the timely exchange of accurate metadata between content providers and knowledge base developers. A number of other major organizations in the scholarly information supply chain are also working towards KBART endorsement. To read the Phase I report and recommendations, go to [http://www.uksg.org/sites/uksg.org/files/KBART\\_Phase\\_I\\_Recommended\\_Practice.pdf](http://www.uksg.org/sites/uksg.org/files/KBART_Phase_I_Recommended_Practice.pdf). *Press Release*, June 1, 2010, <http://www.uksg.org/news/kbartmay10>.

*The Charleston Report, Business Insights into the Library Market* is published six times a year by The Charleston Co., 6180 East Warren Avenue, Denver, CO 80222. Subscription price per year is \$155 (U.S.) and \$170 (outside the U.S.). FAX: 303-282-9743.

*The Charleston Report* is written for publishers, vendors, product developers, merchandisers, and wholesalers who are interested in expanding their library market. Readers will gain insights in effective marketing to libraries, early alerts to library trends, access to library leaders' future plans, library budget projections, library strategic plans, technology directions, and publications needs.

For comments and contributions, contact Laura Barfield, <barfieldlaura@gmail.com>, Editorial Offices, 6180 East Warren Avenue, Denver, CO 80222. 303-282-9706, FAX 303-282-9743, (c) Copyright 2010, The Charleston Co. All rights reserved. ISSN 1091-1863.

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Publisher: The Charleston Co.

Graphic Design: Toni Nix • Masthead Design: Jack Thames

## By the Numbers

**96%...**The percentage of Americans who think that school libraries are an essential part of the education experience. *State of America's Libraries Report 2010*, April 11, 2010, [http://www.ala.org/ala/newspresscenter/mediapresscenter/americaslibraries/ALA\\_Report\\_2010-ATI001-NEW1.pdf](http://www.ala.org/ala/newspresscenter/mediapresscenter/americaslibraries/ALA_Report_2010-ATI001-NEW1.pdf).

**82%...**The percentage of Internet users who looked up information or completed a transaction on a government Website over the previous year. *Pew Internet*, April 27, 2010, <http://www.pewinternet.org/Media-Mentions/2010/AP-Americans-Connecting-With-Government-Online.aspx>.

**35 zettabytes...**The total amount of digital information projected to exist in 2020, or 44 times more information than in 2009. (1 zettabyte = 10 billion terabytes.) *Wired*, April 30, 2010, <http://www.wired.com/gadgetlab/2010/04/here-comes-the-zettabyte-age/#more-39224>.

**30.3 billion...**The number of videos viewed by 178 million Internet users in the United States in April 2010. *TheNewYorkTimes.com*, June 1, 2010, <http://bits.blogs.nytimes.com/2010/06/01/youtube-dominates-online-video-views/?partner=rss&emc=rss>.

**27...**The number of known cases of unanimous faculty votes for institutional OA policies, more than twice the number of one year ago. *The SPARC Open Access Newsletter*, June 2, 2010, <http://www.earlham.edu/~peters/fos/newsletter/06-02-10.htm>.

**5 million...**The number of eBooks downloaded in the first 65 days since the launch of the iPad. *TheBookseller.com*, June 8, 2010, <http://www.thebookseller.com/news/120180-ibookstore-readied-for-new-iphone-as-market-share-reaches-22.html.rss>.

## Did You Know?

The *Bibliography of the History of Art (BHA)* is now available free of charge on the Getty Website at <http://library.getty.edu/bha>. The database search includes both *BHA* (covering 1990-2007) and the *International Bibliography of Art (IBA)*, covering the years 2008 and part of 2009. The *Répertoire de la littérature de l'art (RILA)*, one of the predecessors of *BHA*, with records that cover 1975-1989, is also online. *The J. Paul Getty Trust*, April 2010, [http://www.getty.edu/research/conducting\\_research/bha/](http://www.getty.edu/research/conducting_research/bha/).

The New York Public Library purchased a \$2.3 million automated book sorter machine. With the help of the sorter, the Library staff sorts 7,500 items per hour, or 125 a minute, reducing the time it takes a book to travel through the system by at least a day. *The New York Times*, April 21, 2010, <http://www.nytimes.com/2010/04/22/books/22library.html>.

The *Virginia Quarterly* now produces a digital version that is optimized for iPad. It sells for \$3.99 at Apple's iBookstore. *The VQR Blog*, June 8, 2010, <http://www.vqronline.org/blog/2010/06/08/vqr-ipad/>.

## Special TCR Opinion Editorial

### “Mid-Semester Platform Changes: Guidelines for Smart Vendors”

... Reported by Kathy Perry, Director, VIVA ([www.vivalib.org/](http://www.vivalib.org/))

On Monday, March 1, 2010, I posted a little email to the liblicense listserv as an open letter to vendors and publishers stating that “Although it seems obvious, apparently it isn’t, so I feel compelled to make this statement: It is usually a very bad idea to make platform changes in the middle of the academic semester.”

Over the next few weeks I received many emails from other librarians who agreed with me and my email was re-posted to at least one other listserv. I guess I wasn’t the only one who felt that way.

Quite interestingly, I also received one email from a vendor requesting participation in a focus group reviewing their platform change. (While I appreciated the invitation, this is not a product my consortium subscribes to and I really couldn’t spare the time.)

My consortium, the Virtual Library of Virginia (VIVA), has contracts for approximately 60 different products on about 25 different platforms. This semester we experienced 3 major platform changes, one of which was a textbook case study not only of the worst possible transition but also of the worst possible customer service following the worst possible transition.

There aren’t any written rules on this, that I’m aware of, but here are some guidelines to avoid becoming the next case study in the worst possible transition:

1. Choose a time for the transition or maintenance that does not conflict with the academic calendars of your clients. For those of us in the Northern Hemisphere, that pretty much limits major interface changes to June or July, after the spring semester and well before the beginning of the fall semester so that librarians can prepare bibliographic instruction materials.
2. Even better, allow your clients to choose when they want to make the transition. Many of our vendors have done that and it has been up to us to decide if we want to make one decision for all members of the consortium or let each institution make their own decision. This has worked very well in the past.

3. Be sure the techie folks are not running the show by themselves, especially not when it comes to determining the transition timing. Please give the sales folks some credit for knowing their clients and integrate that knowledge into the whole organization. (When I draw an organization chart of my vendors, I often show the techie folks in their own world, completely unconnected to the rest of the organization or to their clients. This only leads to problems.)

4. Be sure to test and retest the new interface with an eye to service ramifications on our libraries. Techie folks apparently don’t always know the ramifications of the changes they make it can cause tremendous work and additional headaches for every library customer. (Look, I’m sorry to have to say this, but exactly how could a major vendor change the interface and not know that links to MARC records would no longer work?) Libraries are very complicated organizations these days and poorly planned and poorly executed interface changes can require significant and burdensome procedural changes in several departments of every library. For example, when the MARC records no longer are correct, every library had to find and download new files and reload records to help make the product discoverable again. Other interface changes have required redoing URLs on the library web, alerting faculty and students to changed URLs they may have bookmarked or may have incorporated into their management courseware, redoing bibliographic instruction materials and research guides, changing procedures for gathering usage data, etc.

5. Communicate clearly.
  - a. Provide sufficient warning that a transition is about to occur. Please send out the

notice well before the event. If the event is going to take place over the weekend, it doesn’t do much good to send a notice out after 5pm on Friday.

*continued on page 4*

#### **\*\*ORIGINAL POST\*\***

From: Kathy Perry <[kperry@gmu.edu](mailto:kperry@gmu.edu)>  
 Reply-To: <[liblicense-l@lists.yale.edu](mailto:liblicense-l@lists.yale.edu)>  
 Date: Mon, 1 Mar 2010 19:16:43 EST  
 To: <[liblicense-l@lists.yale.edu](mailto:liblicense-l@lists.yale.edu)>

Subject: Mid-semester platform changes -- please don't!

This is an open letter to Vendors and Publishers and I apologize if this is not the appropriate listserv.

Although it seems obvious, apparently it isn’t, so I feel the need to make this statement:

“It is usually a very bad idea to make platform changes in the middle of the academic semester.”

We’ve had 3 vendors announce interface changes within the past 2 weeks — one is causing significant problems, despite the usual promises of it being “seamless.” And these are not business databases, but ones where the academic community represents major portions of their customer base.

While I realize the calendars are not the same for all colleges, universities, countries, or continents, some consideration has to be given to the academic calendars. Major changes can (and often do) produce confusion for our students, faculty, librarians and staff throughout the library. The impact can be observed in broken links in course management systems, MARC records that have to be reloaded, bibliographic instruction materials requiring revision, reference staff and virtual reference staff requiring retraining, and lost use data, to name just a few aspects coming to light in the wake of these “seamless transitions.”

Thank you, Kathy

Katherine A. Perry  
 VIVA Director

## Special TCR Opinion Editorial *from page 3*

b. If you're doing this, think about the most effective communication strategy and don't just use Facebook (I kid you not — this has happened. Facebook is cool, but it is definitely not the best way to reach all of your customers. To point out the obvious [again], not all of your customers will have chosen to be your “fan” and will not receive the notice — duh.)

c. Please be specific about the time and the time zone when the maintenance will occur. We often get email notices without any recognition that our students and faculty may, in fact, be in several different countries over several different time zones. We've got distance education students in ships at sea, faculty doing research all over the world, and so on.

d. If your customer is a consortium, send a notice to the consortium central office. (Yep, the consortium office should not be the last to hear about a major platform change.)

e. Provide correct information and clear instructions if procedures are involved. This is especially important if action has to be taken by each individual institutional library. In our textbook case study for the worst possible transition, not only did the initial communication provide incorrect information about the MARC records, but we were inundated with 4 personal phone calls following up on the disaster and not one single email with correct instructions we could share with our members. We were reduced to begging for correct instructions. Note to vendors: proper customer care does not mean pulling in the sales force after the disaster and inundating the clients with multiple personal phone calls when a simple e-mail message with clear instructions would have been much more helpful and much, much more appreciated.

Finally, let me say our vendors and publishers are generally wonderful people and fully aware of the academic calendars — they know to avoid major maintenance down times when our students are most likely to be studying and they know better than to change the way the interface looks in the middle of the semester. They know we will groan and roll our eyes upon hearing the usual assurances that “the transition will be seamless” (really?) and they know that we expect and deserve to see adequate warning about any major changes. Still and all, it is always a surprise when one of our providers appears to run a multi-million dollar business as if it didn't exist to serve clients and with little apparent reflection on standard business procedures for either technology or customer care.

## LA Students Create “People’s Library”

Students at California State University, Los Angeles, opened the so-called “People’s Library” just outside of the main library on June 1 after administrators curtailed regular library hours, closing at 8 p.m. instead of midnight, because of state budget cuts. Organizers contend that reduced access to library resources was affecting students’ studies, especially before final exams. Students are using donated chairs and tables and campus electrical hookups for lighting and equipment. Cal State administrators at first threatened to close down the alternative operation and briefly turned off its electricity because students launched the effort without notifying officials. After addressing safety issues such as securing electrical cords, there have been no incidents. The library budget was cut 20% this year from \$4.5 million to \$3.6 million. *The Los Angeles Times*, June 10, 2010, <http://articles.latimes.com/2010/jun/10/local/la-me-calstate-library-20100607>.

## Must Reads

“**Toward a New Alexandria: Imagining the Future of Libraries**,” Lisbet Rausing, *The New Republic*, March 12, 2010, <http://www.tnr.com/article/books-and-arts/toward-new-alexandria>.

**Digital Information Seekers: How Academic Libraries Can Support the Use of Digital Resources**, Lynn S. Connaway and Timothy J. Dickey, JISC, March 30, 2010, <http://www.jisc.ac.uk/publications/briefingpapers/2010/bpdigitalinfoseekerv1.aspx#downloads>.

“**Gutenberg 2.0: Harvard’s Libraries Deal with Disruptive Change**,” Jonathan Shaw, *The Harvard Magazine*, May-June 2010, <http://harvardmagazine.com/2010/05/gutenberg-2-0>.

**The Idea of Order: Transforming Research Collections for 21st Century Scholarship**, Paul N. Courant et al., CLIR, June 2010, <http://www.clir.org/pubs/reports/pub147/pub147.pdf>.

**Academic Librarianship: Leaders Look Toward the Future**, compiled by Camila A. Alire and G. Edward Evans, <http://www.neal-schuman.com/academic/>.

## Mark Your Calendars

**The American Library Association 2010 Annual Conference**, June 24-29, Washington, D.C., <http://www.ala.org/ala/conferencesevents/upcoming/annual/index.cfm>.

**The 39th LIBER (Association of European Research Libraries) Annual General Conference: Re-Inventing the Library. The Challenges of the New Information Environment**, June 29-July 2, Aarhus, Denmark, <http://www.statsbiblioteket.dk/liber2010>.

**World Library and Information Congress: 76th IFLA (International Federation of Library Associations and Institutions) General Conference and Assembly: Open Access to Knowledge - Promoting Sustainable Progress**, August 10-15, Gothenburg, Sweden, <http://www.ifla.org/en/ifla76>.

**ASIS&T: The Information Society for the Information Age 2010 Annual Meeting**, October 22-27, Pittsburgh, PA, <http://www.asis.org/Conferences/AM10/am10cfp.html>.

**The XXX Annual Charleston Conference: Anything Goes!**, November 3-6, Charleston, SC, <http://www.katina.info/conference/>.

## Wikipedia Call for Librarians

Wikipedia has launched an effort to reach out to librarians. Parent company Wikimedia initiated an “FAQ for Librarians” [http://outreach.wikimedia.org/wiki/FAQ\\_For\\_Librarians](http://outreach.wikimedia.org/wiki/FAQ_For_Librarians) on its Wikimedia Outreach site, calling for individual librarians to become volunteer editors. *Library Journal*, June 7, 2010, [http://www.libraryjournal.com/lj/newsletter/academicnewswire/885164-329/in\\_faq\\_wikipedia\\_reaches\\_out.html.csp](http://www.libraryjournal.com/lj/newsletter/academicnewswire/885164-329/in_faq_wikipedia_reaches_out.html.csp).