



# The CHARLESTON REPORT

## *Business Insights into the Library Market*

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### Short Takes

**Johns Hopkins University Press** has announced the award of a grant from the Andrew W. Mellon Foundation to support the development of MUSE Open, a distribution channel for open access monographs available through Project MUSE which will offer an enriched digital format. Monographs included in the program will be distributed globally and made visible and usable through discoverability and accessibility tools normally reserved for paid content. MUSE Open content will be promoted to researchers, students, and general readers worldwide through existing library channels and through social media, including MUSE Commons. Participating publishers will control sales, distribution, and marketing of the corresponding printed works. Full press release available at <http://musecommons.org/blog/2015/06/02/jhup-receives-grant-to-develop-muse-open/>.

**OCLC** has announced new signed agreements with leading publishers in Science, Technology, Engineering, Medicine and other subject areas to add metadata for books, e-books, journals, databases and other materials that will make their content discoverable through WorldCat Discovery Services. At present, OCLC has agreements in place with more than 180 publishers and information providers to supply metadata to facilitate discovery and access to key resources. Among the new publishers and agencies to sign agreements are the American Society of Civil Engineers, BMJ Publishing Group, and Publishing Technology PLC. For more information and the list of new agreements, logon to <http://www.oclc.org/news/releases/2015/201517dublin.en.html>.

**The University of Minnesota Press, in partnership with the GC Digital Scholarship Lab** at the Graduate Center of the City University of New York, has been awarded a \$732,000 grant from the Andrew W. Mellon Foundation to launch Manifold Scholarship. Minnesota and The Graduate Center will work again with the web development team at Cast Iron Coding, who partnered with them to build the open-access book platform *Debates in the Digital Humanities* (<http://dhdebates.gc.cuny.edu>). In Manifold, a digital scholarly work would not be a static replication of the print book. From the beginning it is dynamic, revised, and expanded to reflect the evolution of academic thought and research, incorporating access to primary research documents and data, links to related archives, rich media, social media, and reading tools. Read more at <http://www.upress.umn.edu/press/press-releases/manifold-scholarship>.

### 2015 Charleston Conference: Seminars and Preconferences

**Where do we go from here?** That is the question we're asking for the 2015 Charleston Conference, which will be held in beautiful Historic Downtown Charleston, South Carolina, this November. We are looking forward to hearing all the answers that will be presented there!

This year, there will be three Charleston Seminars on the Monday and Tuesday preceding the main conference:

1. **Acquisitions Bootcamp** — <http://sched.co/3WQO>  
Monday, Nov. 3, 9:00 am – 4:00 pm and  
Tuesday, Nov. 4, 9:00 am – 12:00 pm  
Taught by UNC SILS Faculty
2. **Legal Issues in Libraries** — <http://sched.co/3WQM>  
Tuesday, 11/4, 9:00 am – 4:00 pm
3. **Understanding the Library Market** — <http://sched.co/3Z7i>  
Tuesday, 11/4, 1:00 – 4:00 pm

We also have a great variety of preconference sessions that will be held on Wednesday, November 4. These workshops will be on topics such as altmetrics, KBART compliant metadata, streaming video, data-driven decision making, e-resources management, visualizing usage data, and much more. Details are online at <http://www.charlestonlibraryconference.com/preconferences/>. You can register for these sessions when you register for the Conference, or if you've already registered and wish to add a preconference you can email Sharna Williams at <[sharna@charlestonlibraryconference.com](mailto:sharna@charlestonlibraryconference.com)>.

#### About the Charleston Conference:

The Charleston Conference is an informal annual gathering of librarians, publishers, electronic resource managers, consultants, and vendors of library materials in Charleston, SC, in November, to discuss issues of importance to them all. It is designed to be a collegial gathering of individuals from different areas who discuss the same issues in a non-threatening, friendly, and highly informal environment. Presidents of companies discuss and debate with library directors, acquisitions librarians, reference librarians, serials librarians, collection development librarians, and many, many others. Begun in 1980, the Charleston Conference has grown from 20 participants in 1980 to over 1,600 in 2014.

More information: [www.charlestonlibraryconference.com](http://www.charlestonlibraryconference.com).

### By the Numbers

**400,000...** the number of ISNIs (International Standard Name Identifiers) for organizations now available in the Ringgold Identify Database, according to a recent release. For organizations wishing to obtain the ISNI number for their own institution, Ringgold provides a free lookup service for ISNI numbers at: [ido.ringgold.com](http://ido.ringgold.com).

# TCR Reports from the Field: 2015 Inaugural Sydney Conference: “Scholarly Communication Beyond Paywalls”

...with thanks to Conference Convener JoAnne Sparks, University Librarian, Macquarie University, Sydney, Australia, for this report <[joanne.sparks@mq.edu.au](mailto:joanne.sparks@mq.edu.au)>

The inaugural “Sydney Conference: Scholarly Communication Beyond Paywalls” was held in Sydney, Australia at Macquarie University from July 22-24, 2015. Initiated by JoAnne Sparks, University Librarian, the model was based on the highly successful self-funded, independent Charleston and Fiesole conferences in the United States and Europe. An Advisory Group, logistics teams and volunteer facilitators all played an integral role in delivering a highly satisfying experience. The format of the conference was somewhat different in that there were no keynote speakers or formal presentations. Rather, participants engaged in a think-tank (thinkfest) over a three day period.

The Sydney Conference brought together a diverse range of approximately 100 invitees (authors, researchers, students, librarians, information scientists, publishers and distributors of scholarly content) to tackle the challenge of imagining a future state in scholarly communication that would transcend current, restrictive models. What new paradigms(s) might emerge from such a collaborative effort?

In order to maximize coverage of key themes, five related threads were established: peer review, containers (packaging), barriers, roles, and data. Attendees self-selected to actively participate in one thread for all three days. Thread co-facilitators used the Merlin approach to lead discussion, i.e., visualize a future point and then work backward to determine what needs to change in order to reach the end goal(s).

## Some of the thinking which has emerged thus far:

- **Peer Review:** Depending upon the discipline, there is a role for some pre-publication peer review; even more importantly, there needs to be formal recognition for those undertaking this task.
- **Data:** Broad public discourse on open data is needed with a wider group of stakeholders along with (a) establishing uniformity in data definitions and (b) rewards for publishing data.

- **Barriers:** Advocacy is something which individuals — as well as groups — can successfully accomplish, especially at a local (campus) level regarding open access.
- **Roles:** This group developed a 10-point action plan.

On the topic of **Containers**, a major breakthrough came for those stretching to visualize what units of scholarly communication should be valued. Based on work done by Van de Sompel et al in 2009, they developed the key non-linear functions / criteria of a proposed scholarly communication ecosystem and concluded that the format in which a work is presented is generally irrelevant as long as it can meet some or all of the criteria of the ecosystem. At the same time it was recognized that scholarly communication produces iterative / evolving products, which need to be captured and acknowledged, similar to the dynamic (living) figures at F1000Research. Charlie Rapple from Kudos has provided an excellent overview on her blog at <http://blog.growkudos.com/2015/07/24/forget-the-format-focus-on-the-functions-research-evaluation-re-evaluated/>.

Participants have expressed the strong wish to continue discussions and thinking begun with colleagues at the conference. Already some participants are presenting at other workshops. These evolving plans include the idea of working parties that will collaborate in between face-to-face meetings. A number of attendees have requested future meetings using the think tank format.

The organizers wish to acknowledge the generous sponsorship of Sage Publications, Springer, EBSCO Information Services, the University of New South Wales Library, and Macquarie University.

**A final note:** For more details and to follow updates, see the Sydney Conference website at: <https://sydneyconference2015.wordpress.com/>.

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*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 Rebecca Lenzini, <[rlenzini@charlestonco.com](mailto:rlenzini@charlestonco.com)>, Editorial Offices, 6180 East Warren Avenue, Denver, CO 80222. TEL: 303-282-9706, FAX: 303-282-9743, (c) Copyright 2015, The Charleston Co. All rights reserved. ISSN 1091-1863.

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## Don't Miss This!

“**The Once and Future Publishing Library,**” a study by Ann Okerson (Center for Research Libraries) and Alex Holzman (Temple University Press) on the present state of publishing activities in American academic libraries, has been published by CLIR (Council on Library and Information Resources) as a web-only, free report. The authors trace the history of library publishing and factors that have transformed the publishing landscape, and describe several significant library-press collaborations forged over the past two decades. Also included in the report is a detailed listing by academic institution of publishing related enterprises underway as of 2014-2015 as well as results of a survey the authors conducted to better understand how current library publishing initiatives are supported financially. Download the full report at <http://www.clir.org/pubs/reports/pub166>.

# TCR Conference Round Up: ALA San Francisco, June 25-30, 2015

... Reported by Tom Gilson, Associate Editor, *Against the Grain*, <GilsonT@cofc.edu>

San Francisco turned out to be an inspired choice for the 2015 ALA Annual conference. Great weather, a rich program plus two halls filled with relevant exhibits combined with a historic Supreme Court decision on Gay marriage to make the “City by the Bay” the place to be for the 22,696 librarians and exhibitors in attendance. The overall turnout was up some 13% from the 19,889 that attended last year in Las Vegas. In addition, 845 companies with 6,813 exhibitors were on hand to promote their products and services.

**ALA Annual conference attendance figures for the last three years:**

Final Registration Numbers	2013 Chicago	2014 Las Vegas	2015 San Francisco
Attendees	17,657	14,282	15,883
Exhibitors	5,888	5,607	6,813
Total	23,545	19,889	22,696

Despite the uptick in attendance, we know that a number of you couldn't break away from your duties at home to be there, so once again, we thought we would try and convey a sense of what went on by sharing a few conference related posts and articles that “caught our eye.”

**ALA 2015: All Our Coverage** (<http://publishersweekly.com/pw/by-topic/industry-news/trade-shows-events/article/67347-ala-2015-all-our-coverage.html>) is a collection of posts from *Publishers Weekly* that offers their “complete coverage of the 2015 ALA Annual Conference, including a survey of the main events; the speakers; the readings, discussions, and presentations; the panels, and more.”

**The San Francisco Deets | ALA 2015** (<http://lj.libraryjournal.com/2015/06/organizations/ala-organization/the-san-francisco-deets-ala-2015/>) provides conference details and combined observations from Library Journal reporters on the scene. Coverage ranges from the opening keynote by Roberta Kaplan, lawyer for the Supreme Court case that overturned the Defense of Marriage Act to the announcement of the Knight Foundation's second News Challenge for Libraries (<http://www.knightfoundation.org/blogs/knightblog/2015/6/26/knight-news-challenge-libraries-set-future/>) to the standing room only: “Look into the Crystal Ball: Future Directions for Higher Education and Academic Libraries” panel.

**Academic Libraries Look Toward the Future** (<http://lj.libraryjournal.com/2015/07/shows-events/alalacademic-libraries-look-toward-the-future-ala-annual-2015/>) is the full blow-by-blow description of the above mentioned “Look into the Crystal Ball: Future Directions for Higher Education and Academic Libraries” panel. As LJ's Lisa Peet notes “the panelists — Chris Bourg, Massachusetts Institute of Technology director of libraries; Janice Jaguszewski, director and associate university librarian of health sciences at University of Minnesota (U of M) libraries; Deanna Marcum, managing director at Ithaka S+R; and Mitchell Stevens, associate professor of education and sociology at Stanford University — represented a variety of institutions. And while they all agreed that academic libraries were in a time of flux and needed to keep their eyes on the horizon, each had a different take as to how...”

**American Libraries in-depth coverage of specific Annual Conference events, speakers, awards and other highlights** (<http://americanlibrariesmagazine.org/tag/alaac15/>) is a link to the extensive coverage posted by *American Libraries*. It may take a good bit of scrolling to find what you want but there is a wealth of information here.

**2015 ALA Annual Conference & Exhibition — historic celebrations, future-focused work** (<http://www.ala.org/news/press-releases/2015/06/2015-ala-annual-conference-exhibition-historic-celebrations-future-focused>) is the overall report from *ALANews* complete with links to other relevant articles and reports.

**Exhibitor News Roundup | ALA Annual 2015** (<http://lj.libraryjournal.com/2015/07/shows-events/ala-a-variety-of-vendor-news-ala-annual-2015/>) is *Library Journal's* annual roundup of what their reporters learned as they scouted the exhibits. Top developments include a new EBSCO and Ex Libris partnership; ProQuest debuting the functionality of Intota v2 as well as a new University Press Ebook Subscription; Gale's partnership with Skillsoft to deliver online workforce training courses; SirsiDynix and Zepheira partnering to develop the Visible Library Beta Program that will convert MARC records to linked data; Innovative announcing a new service to simplify the publication of Linked Data records; and Elsevier launching Library Learning Trends, a professional development program for librarians and information resource managers...

**Individual session reports include:**

**Libraries and Book Collections as Essential Cultural Institutions | ALA Annual 2015** — [http://lj.libraryjournal.com/2015/07/shows-events/alalibraries-and-book-collections-as-essential-cultural-institutions-ala-annual-2015/#\\_](http://lj.libraryjournal.com/2015/07/shows-events/alalibraries-and-book-collections-as-essential-cultural-institutions-ala-annual-2015/#_)

**Students, Faculty Engage with Streaming Video** — <http://lj.libraryjournal.com/2015/07/ed-tech/students-faculty-engage-with-streaming-video-ala-annual-2015/>

**ALA Annual: ACRL Student Retention Discussion Group** — <http://www.acrl.ala.org/value/?p=894>

**Resources for Reinvestment in Academic Libraries** — <http://www.sr.ithaka.org/blog-individual/resources-reinvestment-academic-libraries>

**Rethinking Privacy at the LITA Top Tech Trends Panel | ALA Annual 2015** — <http://lj.libraryjournal.com/2015/07/technology/rethinking-privacy-at-the-lita-top-tech-trends-panel-ala-annual-2015/>

**ALA 2015: On E-books, Libraries Pushing For Options** — <http://publishersweekly.com/pw/by-topic/digital/conferences/article/67342-ala-2015-on-e-books-libraries-pushing-for-options.html>

**Libraries and Book Collections as Essential Cultural Institutions | ALA Annual 2015** — <http://americanlibrariesmagazine.org/blogs/e-content/making-progress-in-digital-content/>

**Making Progress in Digital Content** — <http://americanlibrariesmagazine.org/blogs/e-content/making-progress-in-digital-content/>

*Ed Note: This article first appeared on the ATG NewsChannel on June 19, 2015.*

## Libraries on the Move

**“Text and Data Mining (TDM) in the Humanities and Social Sciences: Strategies and Tools,”** a recent webinar sponsored by the Center for Research Libraries, is now available on CRL’s YouTube channel. Presenters Peter Leonard and Lindsay King of Yale University discussed reasons for the current interest in TDM, what makes a good project, and the implications for libraries of this growing research trend. They also demonstrated Yale’s Robots Reading Vogue platform, showing various projects based on the ProQuest database and responded to questions from webinar participants, including how to get good quality OCR from non-western alphabets or earlier fonts, the relative quality of OCR from various news databases, and what tools to use for topic modeling.

To view the video, logon to [https://www.youtube.com/watch?v=vrX7cM1FC\\_A](https://www.youtube.com/watch?v=vrX7cM1FC_A).

## TCR Quotes

**“The point of scientific publishing is not about publishers; it is about researchers....let us forget about impact factor as a way to organize scientific publishing: it was designed to organize journal (commercial) competition, not to evaluate researchers.”** Excerpted from a post to LibLicense-L, July 21, 2015, by Jean-Claude Guédon <[jean.claude.guedon@umontreal.ca](mailto:jean.claude.guedon@umontreal.ca)>.

## Mark Your Calendars

**November 4-7, 2015 — “Where Do We Go From Here?” Charleston Conference 2015**, 35th Annual Preconferences and Conference, Issues in Book and Serial Acquisitions, Charleston, South Carolina. Details and Registration available at [www.charlestonlibraryconference.com](http://www.charlestonlibraryconference.com). Early Bird Deadline: September 18, 2015.

**November 17-18, 2015 — #Crossref15 Tech Workshops + Member Meeting**, The Taj Hotel, Boston, Massachusetts. Don’t miss the chance to celebrate Crossref’s 15th Birthday. Registration and hotel information available at <http://www.crossref.org/annualmeeting/index.html>.

**November 18, 2015 — TERMS of Engagement: Managing Collections and Electronic Resources Lifecycles**, a free, one-day program hosted by ACRL New England Chapter’s Collection Development Interest Group (CDIG) and Electronic Resources Management Interest Group (ERMIG). 10am-1pm, Sherrill Library, Lesley University, Cambridge, Massachusetts; free breakfast and registration 9:30-10am; optional dine-around lunch and networking 1-3pm. For more information, contact Program Coordinator Martha Kelehan, Tufts University (CDIG), <[martha.kelehan@tufts.edu](mailto:martha.kelehan@tufts.edu)>.

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