Short Takes

Knowledge Unlatched (KU), the global initiative for Open Access monographs, has announced the launch of its next front list and backlist collections: KU Select 2016. KU Select 2016 offers 343 titles to libraries (147 front list to be published between November 2016-April 2017 and 196 backlist published between 2005-2015) along with 16 subject areas in the Humanities and Social Sciences. The collections represent 54 scholarly publishers from five continents. More details available at *http://knowledgeunlatched.org/press-release/*.

The National Information Standards Organization has published NISO RP-25-2016, Outputs of the NISO Alternative Assessment Project. This recommended practice on altmetrics, an expansion of the tools available for measuring the scholarly impact of research in the knowledge environment, was developed by working groups that were part of NISO's Altmetrics Initiative, a project funded by the Alfred P. Sloan Foundation. The document outlines altmetrics definitions and use cases, alternative outputs in scholarly communications, data metrics, and persistent identifiers in scholarly communications. This guidance was necessary because, before the project began, scholars had long expressed dissatisfaction with traditional measures of success, such as the Impact Factor, but needed standards relating to other viable assessment methods. Available for download in PDF from the NISO website, *www.niso.org*.

TCR Reports from the Field:
Major U.S. Libraries Engage with Gold OA While the U.S. Government Opts for Green

…by Anthony Watkinson, CIBER Research, <anthony.watkinson@btinternet.com>

U.S. government funding agencies, faced with pressure to develop open access policies, are beginning to announce what has been called the "Grand Compromise." A key document has come out on September 12th from the DOE (Department of Energy) — *https://www.osti.gov/us-public-access-programs-going-green*.

Written by Dr. Jeffrey Salmon, the Deputy Director for Resource Management in the Department of Energy Office of Science, the paper emphasizes that the agencies are going for green — **not precluding gold but not paying for it** specifically. DOE argues on cost grounds but they are also practical: "…green OA models are a proven, workable solution that achieves the objectives of public access while taking into account the multiplicity of interests involved in the scientific enterprise."

How odd it is, then, that two top U.S. research libraries announced **engagement with gold** earlier in the summer. In July, the Mellon-funded **Pay-it-Forward** project was reported by the **University of California** and the following month, Peter Suber at the **Harvard Office of Scholarly Communication** released **Converting Journals to Open Access**.

The basic assumption of both reports is that **gold is better** — gold means **immediate access to research**. Following is a summary of the arguments of both projects:

- The sub-title sets the scene for **Pay It Forward** — "Investigating a Sustainable Model of Open Access Article Processing Charges (APCs) for Large North American Research Institutions."

- Libraries have an essential funding role in any scenario. As the entity responsible for managing subscription fees today, libraries are well-positioned and experienced in managing publication costs.

- More importantly, the library mission alone within the academy is dedicated to ensuring long-term stewardship and preservation of the scholarly record, functions which will continue to be critical in an open access environment.

- For the most research-intensive North American research institutions, the total cost to publish in a fully APC-funded journal market will exceed current library journal budgets.

- This cost difference could be covered by grant funds, already a major source of funding for publishing fees.

- Ultimately, author-controlled discretionary funds that incentivize authors to act as informed consumers of publishing services are necessary to introduce both real competition and pricing pressures into the journal publishing system.

- For any gold open access model to be viable, it must be sustainable for stakeholders beyond the libraries.

- To that end, the project team sought to determine whether the model as developed provided sufficient financial latitude for publishers to perform their core functions.

- There is a lot of both high quality background research and an analysis providing actual numbers which is bound to be highly influential.

TCR Reports from the Field — *from page 1*

- The purpose of the **Harvard project** is to provide materials for advocacy. It presents scenarios which can be offered to publishers in order to persuade them that flipping their business models from dependence on subscription income to financing their journal publications in a variety of different ways that enable immediate open access is the way to go.

- Peter Suber, who now runs the Office of Scholarly Communications, justifies a concentration on flipping journal business models rather than just starting new journals. The argument recognises the perennial problem of library budgets. New OA journals just add to old prestigious journals which continue subscriptions.

- The text of the document is interspersed by comments from experts and it is intended to be just the start of an ongoing process of refinement.

Neither of these very different promotions of gold OA has yet achieved much in the way of comment from the big library associations but they are certainly worth looking at.

For a link to the full Pay-it-Forward report and data sets, logon to *http://libraries.universityofcalifornia.edu/content/uc-davis-and-cdl-complete-pay-it-forward-project.*

To follow the Harvard "Journal Flipping" project, add this link to your Bookmarks: *https://osc.hul.harvard.edu/programs/journal-flipping/.*

By the Numbers

22.7%... the decline in U.S. ebook sales between April 2016 and April 2015, as reported by the Association of American Publishers (AAP). Of note, this compares to an increase of 20.4% in downloaded audiobooks for the same period. University presses were also reported as down 8.7%. Full overview available at *http://newsroom.publishers.org/.*

Libraries on the Move

Building upon a set of **API (Application Programming Interface) Requirements** developed by Queens Library, a new NISO Working Group has been approved by Voting Members of the organization. The group's project will create a foundational API set that the library community can build on with the goal of modernizing library-vendor technical interoperability to improve access to digital library content and electronic books. This set will fulfill an array of user and library needs, including quicker response times, flexible item discovery and delivery options, improved resource availability, and more seamless integration of electronic and physical resources. NISO is the National Information Standards Organization, a not-for-profit association accredited by the American National Standards Institute (ANSI). For more information, visit *http://www.niso.org/home/*.

Don't Miss This! New This Year at Charleston

The new **Fast Pitch Competition** at the **2016 Charleston Conference** invited proposals to pitch a winning idea to improve service at an academic or research library. Applicants were asked to describe a project or venture that is innovative, useful, and better or different than what has been done in the past or is being done currently. The Charleston Conference, now in its 36th year, is designed to bring together librarians, publishers, and vendors to discuss issues of importance to them all. **Katina Strauch**, Founder and Convener of the Charleston Conference says, "The Fast Pitch Competition fits into our philosophy of giving a platform to new voices, with the added benefit of a community vote of confidence and seed money for their new ventures."

Selected applicants will have five minutes to pitch their idea before a Charleston Conference audience and a panel of judges who will determine the finalists. The **Goodall Family Charitable Foundation** will sponsor two $2,500 awards for the finalists. The Goodall Foundation is an independent family foundation that focuses on making grants to support educational endeavors. When asked why the Goodall Family Foundation is sponsoring the Fast Pitch Competition, **Steve Goodall**, Founder and President responded, "Academic libraries are at a dramatically new frontier based on all of the advances in information technology. Given this, we want to hear from proactive librarians who are creating change and shaping the future. The award being sponsored is to encourage librarians to develop innovative ways of meeting user information needs in better ways than in the past. By holding the Fast Pitch Competition, we intend to showcase the best and brightest new ideas in library information management."

Ann Okerson, Senior Advisor at the Center for Research Libraries and one of the creators of Fast Pitch commented. "Since 1980, the Charleston Conference has been known for innovating new ideas and formats. This time, aiming to encourage attendees to think like startups (or upstarts!), we're experimenting with a Shark Tank-like session for a blend of creativity plus fun. If you were just inventing your library, what cool, out-of-the-box things would you think of doing? That's the Charleston Challenge in 2016!"

The 36th Annual Charleston Conference meets on November 3-5, 2016. The Fast Pitch Competition will be on the morning of Friday, November 4. Review the Fast Pitch Proposal Guidelines and application at the Charleston Conference website at *http://www.charlestonlibraryconference.com/fastpitch/*.

ProQuest 2016 eBook Survey Summary

. . . by Alan McKiel, Dean of Library Services, Western Oregon University, <mckiela@mail.wou.edu>

This year ProQuest, which includes ebrary, EBL, and Ebook Central platforms, surveyed over 2,000 students and researchers on their use of eBooks. The survey follows similar surveys conducted in 2008 and 2011 and compares the responses from the three surveys. The following is a brief summary of lightly modified "snippets" from the article, which appears in the November 2016 issue of *Against the Grain*.

Student Rating of Resource Usefulness — Maintaining the top rank as the most useful resource over all three surveys was the ability to use "Google & other search engines" to find relevant materials. eBooks slipped from second to third places from 2008 to 2011 and to sixth place in 2016. Print books fell from second in 2011 to fourth in 2016. E-textbooks moved up from eleventh in 2008 to eighth in 2016 and printed textbooks moved from seventh to third from 2008 to 2016. E-journals ascended from seventh place in 2011 to second in 2016.

Preference for eBook or Print Book — In the 2016 survey, eBooks maintained a marginal preference over print but the preference appears to be slipping. Students use online searching, word processing, and presentation tools so using eBooks should hold an advantage in usefulness over print. The fact that the preference is marginal and perhaps slipping is more unexpected and makes the reasons for not using eBooks of more consequence.

Ebook Frustrations — In an open-ended question, students were asked about what frustrates them about using eBooks. The most frequently occurring comments concerned downloading limitations, eye fatigue, difficulties taking notes, usage restrictions, and the awkwardness of the presentation format for using books.

Ebook Providers — The question was open format and required entering providers that came to mind. The following in order of frequency of mentions was: Amazon (314), ProQuest (195), Google (178), library (129), EBSCO (102), Springer (46), and total for publishers, as a group with at least 10 mentions, (187).

How Students Learned About Providers of eBooks — The most selected provider in the 2016 survey (63%) selected searching online as the means of learning about providers of eBooks. Librarian ranked second with 42%, instructors 39%, peers 23%. In 2008 and 2011 librarian, instructor, and peers ranked first, second, and third with online searching as fourth.

Preference for Sites/Methods for Finding Ebooks — The order of the top four choices was the same for all three surveys: library website or catalog, "Google or other search engines," Google Scholar, and course management systems.

Improving eBooks — The 2016 survey had a gradual spread of selection percentage of methods for improving eBooks that was roughly 10 points on average below the results of the earlier surveys. The drop could indicate improvements in the areas. The only factors to switch positions in the 2016 survey were "better training and instruction" and "multimedia capabilities."

15th Annual Charleston Advisor "Best and Worst" Readers' Choice Awards

The Charleston Advisor is now in its 18th year of publication and for the 15th consecutive year the journal is sponsoring a series of awards for the best and sometimes most problematic digital products of interest to libraries. The awards are not necessarily limited to services reviewed by *TCA*, but *TCA* reviews (if available) were consulted in the final consideration. These awards are published on an annual basis. Members of the editorial board made the final selections in a September 2016 conference call. Awards are given in a group of standard categories with occasional special one-time categories being added as needed.

Best New Product/Service

Zepheira — For years libraries have had much of their cataloged content hidden from the major search engines as libraries had their MARC record content embedded in their integrated library systems. In a great new service, a library may contribute their MARC records to Zepheira and they will be enhanced, optimized (using Bibframe and linked data) and published on the Web so that major search engines such as Google and Bing will index every record. When users search the Web their library catalog holdings will be displayed with links back to the library catalog. Zepheira will work directly with a library or through some of the integrated library system vendors. *https://zepheira.com/*

Most Improved Product

Berg Fashion Library — Since moving to Bloomsbury Publishing Plc, the new Berg Fashion Library is getting rave reviews from librarians and users. It has a cleaner interface and is much more navigable. The service has integrated text and image content on fashion and dress from around the world, from the past to the present. *http://www.bergfashionlibrary.com/*

Best New End User Product

F1000Workspace — A highly rated workspace where scholars and researchers may collaborate to write papers, import references from other reference managers, easily share new citations with co-authors, annotate and discuss articles with collaborators, and other great features. *http://f1000.com/work/*

Best Interface

Pika — A wonderful new reasonably-priced discovery interface developed by the Marmot Library Network, a library consortium in Colorado. It is a highly modified version of VuFind that has been optimized for public libraries and can overlay virtually any integrated library system. *https://info.marmot.org/tiki-index.php?page=Pika+Documentation*

Amazon Echo — An innovative digital assistant that has been widely advertised on television and offers hands-free voice control. It can offer streaming music from many sources (e.g., Pandora, Amazon Prime, Spotify), provide news and weather, read audiobooks, control network-connected household devices, take orders for online restaurant delivery, get an Uber ride and many other functions. *https://www.amazon.com/Amazon-Echo-Bluetooth-Speaker-with-WiFi-Alexa/dp/B00X4WHP5E*

Best Content

ACI Scholarly Blog Index — Although scholars eventually publish their work in journals and monographs, there sometimes

are significant time lags before publication takes place. Scholarly blogs have become a leading source of early information. The challenge is knowing what is authoritative and what is not. This new service is the world's leading aggregator of scholarly blogs. Curated social media and blogs from over 10,000 sources are indexed through their excellent interface with links back to the original entries. *https://scholar.aci.info/*

Best Pricing

Routledge Handbooks Online — These excellent handbooks may be purchased in subject collection packages with a perpetual access model without an annual subscription fee. The one time purchase covers the cost of updates and there are no continuing platform fees. *https://www. routledgehandbooks.com/home*

Best New Mobile App

Blippar — Heard about Pokeman Go? Blippar's augmented reality app lets you scan images in the real world and connect with digital resources around you. They also provide opportunities for businesses to create immersive experiences around their products and offer the exact same platform for educators and cultural institutions and workplaces for free. The mobile app is available in the Apple App Store or in Google Play for Android devices. *https://blippar.com/en/*

RefME — A citation management tool released for mobile devices in 2014 that is continuing to gain traction. Although there are a many other citation managers for the desktop, this is the only one that was specifically developed for mobile devices. There is also a desktop version so the user may easily move between their mobile app and the desktop. Users may enter bibliographic information five different ways to take advantage of the mobile platform. The mobile app is available in the Apple App Store or in Google Play for Android devices. A special Chrome version is also available. *https:// www.refme.com/us/*

Best Effort

Project Muse — The Johns Hopkins University Press in collaboration with the Milton S. Eisenhower University Library have created a strong platform for both journals and ebooks. The ebooks platform was launched in 2012 and includes over 120 scholarly press publishers (mostly university presses). In July 2016, they received a two year Andrew W. Mellon Foundation grant to develop and deploy a platform for open access (OA) scholarly monographs in the humanities and social sciences with an emphasis on U.S. university presses. *https://muse.jhu.edu/*

Ones to Watch

FOLIO — In June 2016, EBSCO announced that it was promoting and financially supporting the development of an open access library services platform to compete with commercial integrated library systems on the market. The acronym stands for the Future of Libraries is Open (FOLIO) with the development being done by Index Data. The code for the system will be freely available on GitHub as it is developed and libraries, consortia or other organizations may use it or also contribute to the community. Quite a number of library-oriented software companies have indicated their interest in developing and supporting the new platform. EBSCO, will also offer hosting services if a library would like to use it but doesn't want to manage it themselves. *https://www.folio.org/*

SocArXiv: Open Archive of the Social Sciences — Social scientists are excited about the development of a new preprint service in their discipline. Modeled on successful pre-print services in other disciplines this will be dedicated to opening up social science, to reach more people more effectively, to improve research, and build the future. *https://socopen.org/*

Unseen Tools (one time award)

CrossRef — librarians, publishers and users have long championed CrossRef for its digital object identifier (DOI) system to support online linking. CrossRef has continued to create many new tools and services behind the scenes to enhance this mission including a metadata API, the ability to add DOIs to preprints in digital repositories, and linking publications to associated research outputs. *http://crossref.org/*

Lemon/Vaporware Award

Intota — An integrated library system platform that was in development by ProQuest for many years and vaporized very quickly once ProQuest acquired ExLibris with their new Alma system.

APA Style Central — As "an authoritative and complete environment for learning about, educating about, writing, and publishing in APA Style," some librarians have indicated that it is over engineered, not what they were expecting, and does not always meet user expectations. It is only available to institutions for an annual license. *http://www.apastyle.org/asc/*

*Ed Note: Awards are published each year in the October issue of **The Charleston Advisor** and are available open access via IngentaConnect and at www.charlestonco.com.*
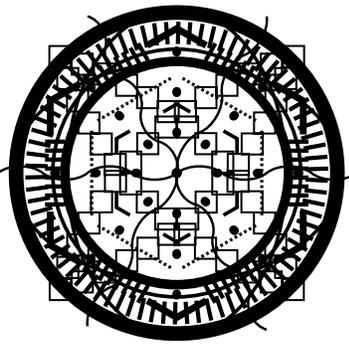
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and special events

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interactive roundtables

▲

workshops on
professional issues

The MLA Annual Convention returns to Philadelphia from 5 to 8 January 2017. The largest scholarly meeting in the humanities, the MLA convention brings together a broad cross-section of the profession to discuss new research, make decisions, and build professional networks. Many librarians will be in attendance.

How to Get the Lowest Rates

Registration and housing opens for members in early September. Become an MLA member now to receive reduced rates for both the Philadelphia convention and the 2018 convention in New York City.

**If you join using the online
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