

On the Circuit

THE TRENDS THEY ARE A'CHANGING

21st Annual Charleston Conference on Issues in Book and Serial Acquisition,
Charleston, South Carolina, October 31 – November 3, 2001

This year's Charleston Conference offered another jam-packed agenda of good speakers and interesting sessions, all devoted to the central issues surrounding publishing and collection development for today's library and information environment. While overall registration was down slightly (the effects of September 11 were still very close at hand), roughly 550 industry leaders and practising librarians turned out, a figure which compares favorably to the usual 600-650 who attend.

October 31st marked the day for preconferences as well as for the Vendor Showcase, a short exhibit sponsored by *The Charleston Advisor*, featuring forty companies showing their online products. Among the preconferences offered were 'PDA-Based Toolkits for Collection Development,' from Michael Cook of Cornell University, 'Management of Acquisitions: Practical Considerations,' from Michael Young of SUNY Albany, 'Serials Management: The Next Generation,' from Buzzy Basch of Basch and Associates, and 'eBooks for Libraries: Mapping a New World,' from Rick Lugg and Ruth Fischer of R2 Consulting.

The Advisor also continued its series of preconferences on the topic 'The Realities of Acquiring Electronic Collections.' This year's session was coordinated by Judy Luther of Informed Strategies, and featured library administrators and others who discussed digitization projects, statistical impacts of electronic collections, and one radical notion –

discontinuing journal check-in altogether!

Then, it was on to the Main Conference, which runs for two and one-half days, from Thursday morning until Saturday noon, with a short 'Rump Session' late on Saturday afternoon for all die-hards. For those who have never had the good fortune to attend a Charleston Conference, it is hard to explain just how many sessions are going on at once. This year's programme featured no less than twenty major presentations, thirty-six concurrent smaller sessions, eighteen 'Lively Lunches,' plus seven 'Beastly Breakfasts,' all competing for attendance and participation, and all on very compelling topics.

The opening keynote was delivered by Tom Sanville, Executive Director of OhioLINK, who presented their consortial 'Big Deals' as one 'economically sustainable solution for increased access.' Tom set the stage for many of the speakers who followed. He characterized the OhioLINK environment as offering user empowerment versus mediation, and access which is abundant versus rationed, universal versus selective, immediate versus delayed, integrated versus segregated. He reminded us that user demand always exceeds our expectations.

Among the many major speakers, Michael Mabe of Elsevier offered his view that the serials crisis is really one of priorities, with libraries receiving at best 2.5% of university funding where an ideal budget would allocate 6%. He also noted that, according to Elsevier surveys of academics, authors want to publish more, but

as readers, they want to read less.

One of my favorite sessions pitted David Kohl of the University of Cincinnati and Ken Frazier of the University of Wisconsin on opposite sides. With Kohl offering the OhioLINK view of the new role of collection development as one which emphasizes more access and less emphasis on 'fine tuning,' Frazier characterized us all as 'hostages of the Big Deal,' and used Wisconsin usage data to prove that his selected, smaller collection generated very high usage figures.

It is impossible to summarize this casual and stimulating conference into any short report. Founder Katina Strauch of the College of Charleston offered her own assessment of the 'hot topics' of the conference in a recent issue of *The Charleston Report*:

After no discussion of archiving last year, it was heartening to see lots of discussion of archiving initiatives, specifically, discussions of the Mellon grants to Harvard and John Wiley (among others) and Stanford's LOCKSS (Lots of Copies Keep Stuff Safe) project. In light of the bankruptcy of netLibrary (announced two weeks before the conference), this seemed especially necessary.

The death of the scholarly monograph was not supported by data from a test group at CalTech. Citation analysis showed that faculty are still publishing books and are still citing books in their research.

There was much talk about full text databases and print journal subscriptions. It is clear that libraries are canceling print to purchase electronic products. Some libraries are even discarding print. This trend will continue. Conversely, Nick Basbanes (*A Gentle Madness, Patience & Fortitude*) extolled the book as artifact and clearly captivated the audience.

Many libraries are moving to use bibliographic utility databases (like OCLC WorldCat and RLN) instead of their own online public access catalogs (OPACs). The reasoning is that the library user should not

be limited to what is housed in his or her local library. This raises questions for the future of the OPAC from integrated library system vendors.

Integration of information resources is a clear collection development strategy. How we achieve seamlessness is still open for debate.

eBooks were very much under discussion. Librarians have moved beyond netLibrary and look toward the new iteration of the eBook. In evidence was Oxford University Press's Scholarship Online and John Wiley's Online Books (announced November 14, 2001), two projects in which the book, like the journal, is now being taken apart for individual article, chapter, or document delivery.

The quote heard most often: 'I don't know what I'm doing anymore.' Libraries have a long way to go to promote their expertise and what they have available.

How can we recreate browsing the shelf and the serendipity of finding information we didn't know existed? This need was mentioned by several speakers and reactors as missing in the current highly computerized information environment.

Is this the sequence? Ken Frazier, University of Wisconsin, commented in reaction to 'the Big Deals' now being negotiated by megaconsortia that collection developers and librarians have moved from 'just in case' to 'just in time' to 'just for you' to 'just pay the bill.'

The core activity for collection developers remains how to evaluate resources and decide which resources fit user needs and to promote effective use of information.

Finally, one speaker (David Levy, University of Washington) reminded us that documents are symbols of human loss and renewal. They play a role in stability and continuity. They are mirrors of who we are – a particularly poignant observation given the sobering events of September 11.

Rebecca Lenzini,
Publisher, *The Charleston Advisor*

SERIALS RESOURCE MANAGEMENT FOR THE 21ST CENTURY: AN INTRODUCTION

UKSG Seminar held at Bristol 10th October 2001

Last year our Serials Librarian retired after forty years' experience of working with serials. This seminar was ideal for the newly appointed staff who replaced him, as well as for one of our more experienced team. Three of us made our way across the road to attend.

After a welcome from Ian Middleton from EBSCO, we launched into the first presentation from **Andrew Wray** of Institute of Physics Publishing (IoPP). This was a chance to hear about the world of serials from a publisher's point of view and Andrew gave us a very thorough description of the work needed to launch and market a serial. Publishers need to make a series of decisions about the type of serials they are publishing, and a decision to publish is not undertaken lightly. I was impressed by his account of the resources and work needed and felt that I understood this side of the business better from his account.

Andrew was followed by **Ian Middleton**, who spoke on 'The changing role of the serials agent'. He outlined the reasons why librarians have found the services of agents such as EBSCO useful in the past. However, their traditional services are in decline, and they are developing new ways, such as aggregation, to meet their customers' needs in the electronic environment. This not only benefits librarians, but may also help publishers; for example, hosting the full text of serials may help smaller publishers especially, who may not have the necessary expertise, while helping providing access for libraries. Agents are also undertaking a role in drawing up model licences; Swets Blackwell and NESLI are an example of this. I found this an useful overview of what an agent actually can offer. It is up to us as librarians to make our own judgements about the way we work with agents, based on our own needs. Knowing what is available is important

and I found this a helpful overview.

Next, **Caroline Moss-Gibbons**, Head of Library and Information Services at the Royal College of Physicians, had the difficult job of keeping our attention before lunch. She outlined the history and nature of her library service, founded by Henry VIII in 1518. It has large print collections as well as needing to serve its members in the rapidly changing medical scene. Because the decision to subscribe to a serial is a long term commitment, financial planning is essential. There are familiar tasks associated with print journals, but electronic journals bring different problems and tasks. For example, is your IT infrastructure able to cope with demands being placed upon it? As the Royal College of Physicians has members throughout the world, remote access to electronic materials is very important; this means that licences have to be carefully checked to make sure that they allow for this. It is also important to provide good user support and education. I found this a very valuable session, as I was seeing the services I am familiar with from another perspective, and this made me think again about how we do things in my own library.

All three morning sessions were full of information and a good introduction to the world of serials from the different viewpoints. We were not all librarians; there were staff from learned societies involved in publishing as well, and there was something for everyone. Over lunch, we all had a chance to relax and enjoy each other's company or discuss things further.

Ross MacIntyre of MIMAS led off the afternoon with 'Getting technical : some e-journal related developments'. I have to admit that I did not manage to follow all of his presentation about open URLs, however he did make me want to know more, so I hope to follow this up, now I

know that such things exist! However, the part about statistics I found useful. Maybe there is more that UKSG could do to make the more technical issues accessible to people like me who have no specialist knowledge.

After all the presentations, it was our turn to ask questions and discuss some of the issues raised. I found this a very helpful and

informative day. Although I have 27 years experience in libraries, I am new to the serials world, so I was especially glad to meet other newcomers and learn from them as well as from the speakers.

Jean Bradford,
Assistant Librarian, Serials and Inter-Library Document Supply, University of Bristol Library

A DAY IN THE LIFE OF A JOURNAL PUBLISHER

Hosted by Emerald, Bradford (formerly MCB Press)
Run by UK Serials Group. 22nd November 2001

This was one of a series of Seminars organised by UKSG, hosted by well known publishers. Encouraged by the title, a 'bevy' of librarians (no prizes for whatever the collective noun is!) stumped up in Bradford on a crisp November morning. The objective of the day was to chart a journal's progress from article submission, through to the end user – who could be the reader, student or library subscriber. Emerald concentrated on improving the understanding of the journal publishing process, especially within the context of a digital environment. Because of this concept the day was obviously biased towards the host publisher and its journals, but having said that the general feeling was that Emerald have done much to move away from MCB's poor reputation, especially on pricing. Through re-branding and innovations (many outlined below) they have tried – with some success – to become the publisher of choice for academics in the fields they cover.

All speakers except one were from Emerald, and they outlined how their own areas of expertise fitted into the publishing process, as well as the changes necessitated by the move from a print environment to an electronic one.

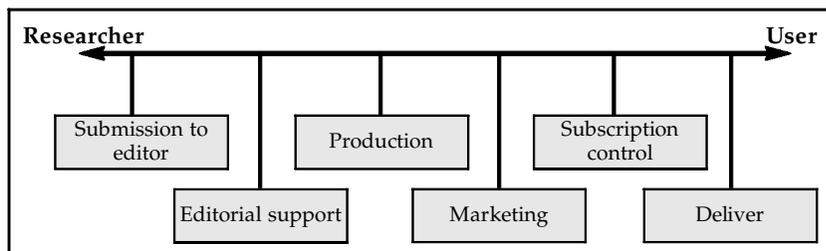
The outside speaker (and Chair for the day)

was Ian Middleton from EBSCO Information Services, a subscription agent, who completed the picture by describing the link between publishers and libraries.

Publishing scholarly journals in the electronic age – providing solutions

Kathryn Toledano, Director: Business Development – Emerald

Kathryn outlined how a publisher's role must be to 'add value to the author's work and its dissemination to potential users – at a surplus'. Her presentation compared current processes with those pre-digitisation and she explained how this move has led to the development of new business models for Emerald. She looked at the value chain from researcher to end user and discussed each of the following processes in turn:



Emerald see themselves as adding value by providing solutions to authors and editors, librarians and users. For authors, they disseminate to relevant users, provide usage statistics and

celebrate success. They also provide workshops on how to get published for new authors. Librarians need value for money and are provided with purchasing and access options, subscription services, account management and product workshops. Users are provided with easy searching options, relevant content, links to related content, options to purchase full text articles, etc.

Kathryn also outlined some of the tensions between the print and electronic environments, and how managing these issues has allowed Emerald to move towards new business models, built mainly around their database products. However, she did feel that it is important to maintain choice for customers, as it is doubtful that they will ever move away from print entirely.

Editorial strategies and how to gain high quality authors and content

John Peters, Editorial Director – Emerald

John looked at the supply and delivery of academic journals as a 'supply circle not a supply chain' i.e. university academics are submitting their research for publication (freely!) to journal editors, the process is managed by publishers who then sell via subscriptions back to the very libraries of the universities generating the research in the first place! Whilst not quite admitting to the flaws in this 'supply circle', we, as an audience, did get an admission that this might not be the only model.

Emerald's strategy is to ensure supply (of articles) by looking after their authors. They are working hard to do just this in a variety of ways, e.g., strengthening the products by Editorial Review Boards, regional editors, editorial advisors, targeted launches, new author support, etc. There are more developments to come, such as on-line discussion of papers, e-mail groups and hopefully a shortened publication cycle.

Striving for high quality content is important to Emerald but this leaves open the old problem of who determines what quality is – who and how. Emerald try to address this by audits, benchmarking, internal discussion forums and external advisory groups. They also take a proactive role in developing 'quality content', with author workshops, the Literati club and best paper awards.

John's presentation ended with the fact that

publishers know they are not indispensable but are concentrating in the current market on (again) adding value and quality.

Marketing journals and databases to gain new customers, retain subscribers and increase usage

Bill Russell, Sales and Marketing Director – Emerald

Bill's enthusiastic presentation outlined a year of huge changes and growth for the company – culminating in the re-branding of MCB as Emerald in June 2001. Emerald was chosen for several reasons, the colour green in many cultures means go, the swirl of the logo gives an active impression, almost ear-like or 'listening' and ultimately stands for **E**lectronic **M**anagement **R**esource **L**ibrary **D**atabase. The brand seems to have been accepted very quickly, as illustrated by the following points:-

- They doubled turnover to £18 million to September 2001,
- Emerald journals were chosen by 93% of the world's top MBA business schools (Ingenta),
- Emerald is now the number 1 source for downloads for full text items on Ingenta,
- They publish more management titles than any other single publisher.

However they do not intend to stop there and will build on 2001's achievements for 2002. The business plan for next year includes growing the brand, continuing to move away from MCB, to spread usage over more titles and an intention to link renewal with database usage.

They have achieved much in a short time and are determined to deliver more in their two main subject areas, Business and Management and Library Studies.

Supplying the electronic library – the agent's role

Ian Middleton, General Manager - EBSCO Information Services

Ian moved away from the publisher's perspective and looked at the process from another intermediary's viewpoint – that of the subscription agent. All agents offer aggregated services, or 'full service' solutions to end users by simplifying the supply process and adding value to it (for example via economies of scale, knowledge and expertise, alerting and

outsourcing services). Users want to quickly identify the journal they want, and obtain it easily, without having to worry about access, rights, copyright, etc. Ian outlined the different types of agents and their roles, emphasising the role of negotiating between libraries and publishers. This did feel a bit like justifying their existence and Ian did accept that they are very much in the middle, whilst all about them is changing fast. Also accepted was the need to embrace the electronic environment, despite such threats as distance learning, where – perish the thought – authors and users may be in direct contact.

E-access – supporting massive annual increases in usage from a publishers' perspective

Dominic Martinez, Head of Marketing Insights and Support Services – Emerald

This was the technical bit. Essentially Dominic's department focuses on customer support and market research. He outlined the implications of doubled usage year on year for Emerald, for robust services, fast access, easier ways to get to content and the ever increasing expectations of users!

They deal with 1000+ queries per month, 90% by email and have a 24 hour response time during the working week. They also run the website <http://www.emeraldinsight.com> – all this with just 2.5 staff.

In the future they intend to make more customer visits (mainly to libraries), develop interactive and searchable files, collate feedback to help develop a better navigation system and offer a 24 hour voicemail service. Their main challenge will be to find out why over 97% of subscribers have an electronic element to their subscription but only 25% have 'turned on' these subscriptions, i.e., 75% of their customers are using less than half their entitlement. It is vital for Emerald to find out why this is, especially if renewal rates are, as they suspect, linked to usage. This will culminate in a Turn On and Tune In campaign next year.

Information sharing between librarians and publishers – what is the best way to communicate?

Cathy Mostyn, Head of Business Development – Emerald

With very little time left Cathy sped through her view of information sharing, currently and

historically. As MCB, communication was mainly via direct mail, promotional flyers, renewal letters, etc. The electronic environment has led to both complications and benefits, and multiple new product types (electronic and print journals, databases, research registers and reference linking) have meant many new roles for publishers such as Emerald.

Cathy outlined briefly the importance of the need to manage relationships well with all customers and how the parallel need to expand value added features has led to changes in internal decision-making processes and thus the very business models they use.

This was a very busy day and although there were some questions from the audience (mainly librarians) it seemed that most people were stunned into silence by the vibrancy of the place and the enthusiasm of the staff. It may sound like a bit of a hard sell by Emerald and to an extent it was, but there were many signs that this company is serious about trying to develop and improve their place in the academic journal market by being proactive and supportive of both authors and users.

They also seem to have fun. The seminar was run in the middle of their Creativity week and there were ideas and quotes put up all over the building, even on the door to the ladies loo. It felt like a good place to be.

There is a flower bed on the lawn in the shape of the Emerald logo and we were treated to the story of the company MD cartwheeling around this flower bed at the launch party in June!

The aim of the day was met, we got a very good idea of a day (or longer) in the life of Emerald, and it's watch this space to see where they go from here – as Bill Russell said, 'It's not about making promises, it's about delivering them!'

**Valerie Bence,
Kings Norton Library,
Cranfield University**