

# Conference 2007 and Exhibition

16-18 April 2007  
University of Warwick  
[www.uksg.org](http://www.uksg.org)



UNITED KINGDOM  
SERIALS GROUP

## PROGRAMME

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# P R O G R A M M E

## Monday 16 April

▶ 08.00	<b>Registration</b>
▶ 10.00	<b>Exhibition viewing</b> , Mead Gallery
▶ 10.30	<b>Opening of the Conference</b> , Arts Centre Theatre Paul Harwood, Chair, <i>UKSG</i>  Greetings from NASIG Denise Novak, President, <i>NASIG</i>
<b>Plenary Session 1</b> Arts Centre Theatre	
▶ 10.40	<b>Chair:</b> Paul Harwood <i>Content Complete Ltd</i>  <b>Research the way you want it: search engines and scholarly publishing</b> Clifford Guren <i>Microsoft Corporation</i>
▶ 11.10	<b>Google's approach to content – opportunities in the age of digitisation</b> Jens Redmer <i>Google</i>
▶ 11.40	<b>The librarian: fantastic adventures in the digital world</b> T Scott Plutchak <i>Lister Hill Library, University of Alabama at Birmingham</i>
▶ 12.10	<b>Lunch and exhibition viewing</b>
▶ 13.30	<b>Workshops and briefing sessions (Group A)</b> Social Studies Building
▶ 14.30	<b>Refreshments and exhibition viewing</b>
<b>Plenary Session 2</b> Arts Centre Theatre	
▶ 15.00	<b>Chair:</b> Debbie Dore <i>Swets Information Services</i>  <b>Marketing the library: using technology to increase visibility, impact and reader engagement</b> Melinda Kenneway <i>TBI Communications</i>
▶ 15.30	<b>The virtual user in the physical space: designing library space in the Google age</b> Sheila Cannell <i>University of Edinburgh</i>
▶ 16.00 to 17.15	<b>Product reviews</b> <b>Chair:</b> Graham Stone <i>The University of Bolton</i>
▶ 18.00	<b>Reception</b> , Mead Gallery
▶ 19.00	<b>Dinner</b>
▶ 21.00	<b>Quiz</b>
▶ 22.00 to 02.00	<b>Disco and bar</b>
} Panorama Suite, Rootes Social Building	

## Tuesday 17 April

▶ 07.30 to 09.00	<b>Breakfast</b> , Rootes Restaurant
▶ 09.00	<b>Product reviews</b> , Arts Centre Theatre <b>Chair:</b> Ian Middleton <i>EBSCO Information Services</i>
▶ 09.45	<b>Workshops and briefing sessions (Group A)</b> Social Studies Building
▶ 10.45	<b>Refreshments and exhibition viewing</b>
<b>Plenary Session 3</b> Arts Centre Theatre	<b>Chair:</b> Hazel Woodward <i>Cranfield University</i>
▶ 11.15	<b>E-textbooks: opportunities, innovations, distractions and dilemmas</b> Tom Davy <i>Thomson Learning EMEA</i>
▶ 11.45	<b>E-books: reinventing the wheel</b> Warren Holder <i>University of Toronto Libraries</i>
▶ 12.15	<b>UK Serials Association AGM</b> , Arts Centre Theatre
▶ 12.45	<b>Lunch and exhibition viewing</b>
▶ 13.45	<b>Workshops and briefing sessions (Group B)</b> Social Studies Building
▶ 14.45	<b>Product reviews</b> , Arts Centre Theatre <b>Chair:</b> Clare Holmes <i>Thomson Learning</i>
▶ 15.30	<b>Refreshments and exhibition viewing</b>
<b>Plenary Session 4</b> Arts Centre Theatre	<b>Chair:</b> Jill Taylor-Roe <i>Newcastle University</i>
▶ 16.00	<b>Are they any use? Hazards of price-per-use comparisons in e-journal management</b> Jason S Price <i>Claremont Colleges Libraries (California)</i>
▶ 16.30	<b>COUNTER: achievements and future challenges</b> Peter Shepherd <i>COUNTER</i>
▶ 17.00 to 18.00	<b>Informal group meetings</b> , Social Studies Building
▶ 19.00	<b>Coaches depart for Stoneleigh Abbey</b>
▶ 19.15	<b>Reception in the West Wing</b>
▶ 20.30	<b>Conference dinner</b>
▶ 22.30	<b>Coaches return to campus</b>
▶ 22.45 to 02.00	<b>Disco and bar, Students' Union Cooler</b>

# P R O G R A M M E

## Wednesday 18 April

▶ 07.30 to 09.00	<b>Breakfast</b> , Rootes Restaurant
<b>Plenary Session 5</b> Arts Centre Theatre	<b>Chair:</b> Tony Kidd <i>University of Glasgow</i>
▶ 09.00	<b>Can open-access repositories and peer-reviewed journals coexist?</b> Stephen Pinfield <i>University of Nottingham</i>
▶ 09.30	<b>How peer-reviewed journals can bring value to institutional repositories</b> Peter Banks <i>Banks Publishing</i>
▶ 10.00	<b>Refreshments and exhibition viewing</b>
▶ 10.30 to 11.30	<b>Workshops and briefing sessions (Group B)</b> Social Studies Building
<b>Plenary Session 6</b> Arts Centre Theatre	<b>Chair:</b> Incoming Chair, UKSG
▶ 11.45	<b>Can the past thirty years tell us about the next decade? A personal review of the recent and future history of the journal</b> John Cox <i>John Cox Associates Ltd</i>
▶ 12.15	<b>Library 2.0: inventing the future</b> Stephen Abram <i>SirsiDynix</i>
▶ 12.45	<b>Close of conference and lunch</b>

# Workshops and Briefing Sessions

This year there will be 30 workshops and briefing sessions from which to select, split into two groups.

**The Group A workshops and briefing sessions will run concurrently on:**

Monday 16 April at 13.30 and Tuesday 17 April at 09.45

**The Group B workshops and briefing sessions will run concurrently on:**

Tuesday 17 April at 13.45 and Wednesday 18 April at 10.30

Delegates will be able to attend a different session for each of the four time slots, and are requested to indicate their preferences on the Delegate Booking Form, having made their selections from Groups A and B.

This year there will be four 'Introductory Level' briefing sessions aimed at those fairly new to the serials industry.

These sessions are marked **IL**.

As the workshops are practical and participative in nature, attendances will be limited to 25. Briefing sessions are more akin to lectures, allowing larger numbers to be accommodated, although delegates will still have the opportunity for questions and discussion. (W = workshop, BS = briefing session)

## Workshops and Briefing Sessions Group A

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|---|---|
| <p>1. (BS) <b>Back to basics</b> <b>IL</b><br/>           Claire Terry<br/> <i>Swets Information Services</i><br/>           Fiona Tipple<br/> <i>University College Dublin</i></p> | <p>This briefing session will present a review of the basic practicalities of the day-to-day management of print and electronic serials in libraries, specifically for those new to the role, exploring areas such as acquisition, renewals, claiming, invoices and access, from the perspective of a serials librarian and a subscription agent.</p>   |
| <p>2. (BS) <b>Introduction to impact factors – meaning, use and interpretation</b> <b>IL</b><br/>           Jo Cross<br/> <i>Taylor &amp; Francis</i></p>                           | <p>This briefing session aims to cover all the basics of impact factors including their calculation, the main issues in using and interpreting them, and also their abuse. The session would suit anyone who is relatively new to the topic or who would like a refresher.</p>  |
| <p>3. (W) <b>Customer service excellence II</b><br/>           Bev Acreman<br/> <i>Taylor &amp; Francis</i><br/>           Graham Stone<br/> <i>The University of Bolton</i></p>    | <p>In last year's workshop discussion centred on the problems in the communication chain between publishers and librarians and what could be done to eliminate them. One year on, the presenters will share the results of their latest survey on customer service – have we moved on, or are the issues still the same?</p> <p>In addition the workshop will develop the idea of Charter Mark as a way to improve quality. As more and more university libraries adopt Charter Mark, is it time for publishers and intermediaries to make performance standards publicly available? Can we agree on them and will this make the communication process even more effective?</p> |
| <p>4. (W) <b>A pragmatic approach to negotiating with publishers</b><br/>           José Fernandes<br/> <i>FCCN (Fundação para a Computação Científica Nacional)</i></p>            | <p>Negotiating with publishers requires a set of skills, as well as knowledge about the product being negotiated and about the market as a whole. Moreover, it is also important to know with whom we are negotiating. As this tends to be a rather complex process, with too many variables, a negotiation guide is an essential tool for a complete and successful negotiation. In this workshop a detailed guide to negotiating will be presented and negotiation methods will be discussed.</p>   |

# PROGRAMME

## Workshops and Briefing Sessions Group A

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### 5. (BS) **Licensing digital resources on a national basis**

Hildegard Schäffler  
*Bayerische Staatsbibliothek München*

This briefing session looks into the feasibility of national licensing of digital resources. Possible parameters include types of e-resources such as archive material versus running content, structural differences between countries concerning the way licensing is organised, as well as central versus local funding. As an example the recent initiative for national licensing in Germany will be introduced, which has been financially supported by the German Research Foundation (Deutsche Forschungsgemeinschaft) since 2004. Participants are encouraged to share experiences from their respective environments.

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### 6. (W) **Cataloguing e-books: a shared experience of the challenges and pitfalls**

Sally Smith  
*University of Surrey*

Electronic books are now a feature of many academic library collections. However, the question of how best to deal with them is still being raised by librarians, and there appears to be very little practical guidance. The University of Surrey began to catalogue e-books in 2005 and quickly discovered that there are many challenges to overcome when integrating e-books into the library catalogue. This workshop is aimed at non-cataloguers and aims to provide a forum for group discussion and sharing of experience about how to cope with dilemmas such as:

- passwords
- importing records
- decisions about whether to provide separate or merged print/electronic records
- updating records.

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### 7. (BS) **CURL/BL storage**

Helen Hayes  
*University of Edinburgh*

In 2005 CURL and the British Library commissioned a CHEMS Consultancy Report to investigate the growing shortage of storage space in UK Higher Education Libraries and consider the need for collaborative effort to develop a UK Research Store based on the existing resources and services of the British Library.

The recommendation of the consultancy formed the basis for further consultation with the research community and a Collaborative Task Force was established to ensure that all stakeholders were provided the opportunity to contribute to discussions, and to develop the workings of the business, service, operational and governance models leading to a bid to HEFCE for first phase funding for the 'UK Research Reserve'.

This session will discuss progress and issues relating to the store including representation on management structure, services, number of copies and business model.

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### 8. (BS) **Project Transfer: an update on the project's successes and challenges**

Nancy Buckley  
*UKSG Project Transfer*

Project Transfer is an across-industry initiative to improve the process of journal titles moving between publishers. Formed in April 2006, Transfer has created an informative website ([www.projecttransfer.org](http://www.projecttransfer.org)), released its aims and scope, and drafted its first Code of Conduct for publishers transferring or receiving journals. This briefing session will update participants on which publishers have committed to the project, proposals for a database of journal transfers, and the next phase of the Transfer Code of Practice, as well as providing a forum for discussion of the challenges and questions that the project faces moving forwards.

## Workshops and Briefing Sessions Group A

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- 9. (BS) The e-Framework: a service-oriented approach to the design and interoperability of e-learning and e-research software systems**  
Adam Cooper  
*JISC CETIS*
- The e-Framework for Education and Research is an initiative by the UK's Joint Information Systems Committee (JISC) and Australia's Department of Education, Science and Training (DEST). The primary goal of the e-Framework is to facilitate technical interoperability within and across education and research through improved strategic planning and implementation processes. The briefing will introduce the philosophy of, and metaphors used in, the service-oriented approach and provide illustrations relevant to e-learning and digital libraries. The emphasis will be on the concepts that underpin the development of the e-Framework rather than on any technical details.
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- 10. (W) Usage statistics analysis: understanding and interpreting user behaviour**  
Alex Boden  
*MPS Technologies*
- The first part of this workshop will cover the current state of usage statistics provision, outlining what data can be obtained from the various standards (with special emphasis on COUNTER), and will begin to explore what this data can reveal to the institution or publisher about their users' behaviour.
- The second part of the workshop will continue to explore the lessons obtained from current usage data and will conclude by examining proposed and potential developments in usage statistics provision.
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- 11. (W) Promoting and maintaining your library's profile in an e-environment**  
Steve Glover  
*Christie Hospital NHS Trust*
- As the library moves towards a virtual existence it is increasingly important to maintain the library's profile within the organisation. This session will examine the questions "Why do we need to maintain a profile within the organisation?", and "What strategies can we enlist to keep the library and its services a valued resource?" Participants will share good practice and discuss why these two questions are important to librarians and suppliers of e-content.
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- 12. (BS) UKSG Usage Factors Project**  
Peter Shepherd  
*COUNTER*
- UKSG has sponsored an investigation into the feasibility of developing a new measure of the status and value of journals, tentatively entitled the journal 'Usage Factor'. The Usage Factor can, in general terms, be described as the usage-based equivalent of the journal Impact Factor calculated by ISI. Whereas Impact Factors are derived from citation data, Usage Factors would be derived from the COUNTER usage data. This briefing session describes the results of the UKSG-sponsored investigation, the conclusions that have been drawn, and the proposed next steps.
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- 13. (BS) Google Scholar @ GSK: from discussion to implementation**  
Jennifer Whittaker  
*GlaxoSmithKline*
- This briefing session will look at the process of implementing Google Scholar within GlaxoSmithKline from the initial discussions and evaluations to its implementation within the GSK environment. This session will specifically cover:
- evaluation and comparison of Google Scholar and other science/academic-specific search engines
  - internal discussions around the positioning of Google Scholar
  - the process of implementing Google Scholar within the GSK intranet
  - the current situation and future for Google Scholar at GSK.

# PROGRAMME

## Workshops and Briefing Sessions Group A

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14. (BS) **Federated access management:  
connecting people to resources**

Nicole Harris  
*JISC*

In February 2006 JISC announced its intention to support federated access management as the preferred access management solution for UK Higher and Further Education. The UK Access Management Federation for Education and Research was introduced to the community on 30 November 2006. This presentation will focus on the opportunities, benefits and costs of the adoption of federated access management from the point of view of a service provider and service customers within UK HE and FE by examining the business case for implementing federated technologies such as Shibboleth. The session will also study the implications of the end of JISC funding for the Athens Access Management System from July 2008 and update delegates on international and national developments in this field.

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15. (BS) **How will subscription agents help you  
manage your e-resources in a constantly  
changing information world?**

Robert Jacobs  
*Swets Information Services*  
Christopher Lewis  
*EBSCO Information Services*

Subscription agents have been and continue to be the crucial link between libraries and publishers to drive efficiencies in a complex acquisition chain. The recent past has seen significant changes in the way in which information is acquired, accessed and managed, requiring subscription agents to evolve their services. How does the academic community view the role of the subscription agent, and what further evolution is required to meet future need?

## Workshops and Briefing Sessions Group B

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16. (BS) **I need this article (or book or thesis or...):  
morphing through the maelstrom** 

Mike McGrath  
*Editor, Interlending & Document Supply*

The presenter will cover the current state of play in document supply and related developments. The briefing will draw on the Literature Review that he writes as editor for *ILDS*. This review is based on the reading of over 150 LIS journals, as well as websites, etc. Areas covered will include copyright, end user empowerment, open access, journal usage, big deals and mass digitisation. He will draw on his previous experience of marketing document supply at the British Library, as well as editing *ILDS* for the last five years. Whilst aimed at those new to the industry, the session should also benefit those with more experience.

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17. (BS) **Financial imperatives for  
libraries and publishers** 

Jill Taylor-Roe  
*Newcastle University*  
Paul Calow  
*Blackwell Publishing*

This briefing session aims to describe the financial structures and practices which govern the ways in which libraries and publishers work. For example – how are funding decisions made and how is expenditure subsequently monitored? What information do we have to provide to our paymasters/shareholders to demonstrate that we are meeting our key performance targets? How do we assess and manage risk? What are our respective planning cycles and where do they intersect? It is hoped that by sharing our understanding of how the two sectors function we can help to foster better working relationships. This session would be particularly useful to anyone new to working in libraries or publishing.

## Workshops and Briefing Sessions Group B

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- 18. (BS) Digital preservation – an overview of LOCKSS/CLOCKSS and Portico**  
Fiona Bennett  
*Oxford University Press*
- With the increasingly diverse and complex way in which digital content is now being made available, there is a growing need for the scholarly community – libraries and publishers alike – to recognise the need to ensure continued availability and preservation for the long term. There are currently several possible services available to use such as LOCKSS, CLOCKSS and Portico and some uncertainty about which, if any, strategy or route is the best to pursue. The presenter will provide a briefing session on this issue, looking at each of the options available in some detail.
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- 19. (BS) Institutional identifiers and the Journal Supply Chain Efficiency Improvement Pilot**  
Helen Henderson  
*Ringgold Ltd*
- Ringgold is engaged in a Journal Supply Chain Pilot project to test the feasibility of maintaining an institutional identifier. Their database currently contains 60,000 identifiers (as of November 2006). The initial pilot covered the UK journals market – now the pilot is being expanded. Who benefits and why? The session will report progress for the work of pilot participants, including Swets, HighWire Press, HighWire press publishers, and the British Library, where the impact on libraries and others in the journal supply chain can be seen.
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- 20. (BS) Building an institutional repository at Loughborough University**  
Joanna Barwick  
*Loughborough University*
- The aim of this briefing session is to give an insight into the different types of work involved in the setting up of an institutional repository. It will focus on the successful growth and development of the repository at Loughborough University, the decisions that have been made, and the challenges that have been overcome. This will include discussion of the motivation for the development of the service, and funding and practical management issues, as well as the marketing and promotion strategies.
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- 21. (BS) Text and data mining: the search for unknown knowns**  
Geoffrey Bilder  
*Consultant*
- ‘Unknown knowns’ is not just another Rumsfeldian paradox. Text and data mining promise researchers new ways of extracting otherwise undetectable patterns of information in large collections of distributed data. This session will present non-technologists with an overview of developments in the application of text/data mining technologies in scholarly research. It will discuss both traditional text mining techniques as well as newer ‘semantic web’-based approaches. The session will address the challenges and opportunities that text/data mining will pose to both publishers and librarians.
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- 22. (W) Mission E-Possible: how to mobilise your work units to tackle an e-only world**  
Jill Emery  
*University of Texas at Austin*  
Clint Chamberlain  
*Trinity University, San Antonio, Texas*  
Dana Walker  
*University of Georgia Libraries*
- Three librarians from the United States of America have accepted as their mission the mobilisation of their work units to leverage existing skills and strengths to develop teams to manage electronic subscription management. This mobilisation has occurred using new software tools, personality testing and the realignment of job functions to tackle an increasing electronically-based subscription environment. Their programme will provide examples of the software tools, personality tests and job realignment used in order to make these changes occur.

# PROGRAMME

## Workshops and Briefing Sessions      Group B

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**23. (W) Journal renewals: the challenge for smaller publishers in a big-deal world**

Nick Evans  
*Association of Learned and Professional Society Publishers (ALPSP)*  
Shelly Lynds  
*Maney Publishing*

As the number of journals published continues to rise, and as library budgets become increasingly stretched, how can smaller and medium-sized publishers protect subscription renewals of their existing titles and attempt to introduce new ones? How can librarians pick and choose the best journals when a large proportion of their budget is committed to big-deal collections? And as developments in new business models, driven by technology change, make for increased volatility in the marketplace for scholarly communication, are there techniques that can be employed to resist an inevitable increase in size for the big players and a decline for the smaller publishers? This workshop is designed to explore some of the issues for publishers and librarians, and to provide an exchange of views on what the future might hold.

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**24. (W) Cross-sector collaboration and the impact on licensing**

David Parkes  
*Staffordshire University*

Why is access to our e-resources so restricted? Are librarians in danger of becoming “front-people for publishers’ licences and access restrictions”? Are we demanding enough from our suppliers? Are we too passive in our relationships with publishers? Are we addressing institutional and educational imperatives for cross-sector collaboration? After all – it’s all public money ... isn’t it?

What can be done? How can we overcome institutional and publisher inertia? What can Shibboleth offer? What can Library 2.0 offer? How can we break the mould and forge new relationships and access to our services?

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**25. (BS) DAI: a digital author identifier linking researchers and authors**

Daniel van Spanje  
*OCLC PICA*

Publications of researchers are published and held by libraries or stored in institutional repositories. Names of authors are used in library catalogues, in institutional repositories, in databases that cover academic research and in systems for registering scientific output. In The Netherlands a project was started to use a unique number for authors and researchers in these different systems. In the project two systems were linked – the NTA, the Dutch thesaurus for personal names in the national shared cataloguing system, and Metis, the system used by universities to register scientific research and output. The primary goal of the project is to use an administrative but unique number, the DAI (Digital Author Identifier), to identify and distinguish authors. The DAI will help to improve searching repositories, catalogues, portals and other search engines.

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**26. (BS) Understanding, implementing and using the COUNTER Code of Practice for Books and Reference Works**

Jenny Walker  
*Xrefer Ltd*

This briefing session on the genesis, development and application of the COUNTER Code of Practice for Books and Reference Works will look at the principles on which it is based, the issues it has been designed to address, and the specific applications of each report. Further, the session will provide advice to publishers on achieving compliance with this standard, and to librarians in using the data from the reports.

## Workshops and Briefing Sessions Group B

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- 27. (BS) Findings and recommendations from the UKSG Link Resolvers and Knowledge Databases project**  
Simon Inger  
*Consultant*
- In the summer of 2006 the UKSG commissioned a study into the supply chain for publishers' journal metadata destined for the link server knowledge databases operated by the link server manufacturers and their library clients. The goals of the study were to uncover the sources of problems in accurate metadata supply and to look at the role that standards might be able to play in improving the metadata flow. This briefing session is a report of the study's findings.
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- 28. (BS) Business models for e-books**  
David Ball  
*Bournemouth University*
- The session opens by portraying the broad context of and recent developments in the e-book market-place. Drawing on experience of a recent national tender for e-books, it examines some of the main business models under which aggregators make e-books available to libraries and compares them with hard-copy pricing. It also discusses base pricing and the (non-)availability of textbooks.
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- 29. (BS) Accessing research outputs for RAE 2008**  
Ed Hughes  
*HEFCE*
- The Research Assessment Exercise (RAE) involves the assessment of research activity in UK Higher Education Institutions by subject-based expert review panels. This briefing session will look at the arrangements put in place for collecting and accessing research outputs for the 2008 Research Assessment Exercise, in particular the development of a licence agreement between PLS and HEFCE regarding access to a wide range of submitted research outputs, both in digital and physical form.
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- 30. (W) Report on the SCONUL Value and Impact Measurement Project**  
Maxine Melling  
*Liverpool John Moores University*
- How do Directors of Library and Information Services demonstrate the worth of their library services? The Value and Impact Measurement Project (VAMP) was funded by SCONUL's Executive in order to help address this difficult question. This workshop reports on the issues considered by the VAMP project group, the methods followed, and on the web-based framework and toolkit developed. As part of its work the project group commissioned a critical review of the existing tools and methods which might be used to measure the impact, worth or value of the library service and of the gaps in provision – the workshop will provide a résumé of the findings of this analysis.

The **UK Serials Group (UKSG)** exists to encourage the exchange of ideas on printed and electronic serials and the process of scholarly communication.

In a dynamic environment, the UKSG works to:

- promote discussion and the free flow of information on serials matters and associated technology
- develop links between all parties in the serials information chain.
- encourage professional awareness, stimulate research and provide a programme of training and education.

The UKSG is a registered charity and a company limited by guarantee. It is the only organisation spanning the wide range of interest and activity between serials producers and readers.

# Serials

for the international serials community

## *Serials-eNews*

# UK SG

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For delegate bookings, please contact Karen Sadler, UKSG Administrator, 15a Stile Road, Headington, Oxford OX3 8AG UK  
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UK Serials Group reserves the right to alter or vary the programme due to events or circumstances beyond its reasonable control without being obliged to refund monies.

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