Carol Goodson -- 2014 Access Services Conference

I feel pretty safe in saying that at 67, I am probably the oldest currently employed librarian in the room…

In fact, I finished my MLS degree in December 1971, before many of you were even born!

I go back so far, that I recall remarking to a colleague at the University of Buffalo, as we were discussing joining OCLC (which was the Ohio College Library Center then and a very new thing): “Why on earth would WE want to join a network of libraries in OHIO????” --because, of course, we were New York and therefore we were the best ☺ Absolutely one of my most embarrassing memories!

I have lived through continual change in the library world ever since I entered it.

* I remember Henriette Avram being on the cover of *Library Journal* back in the early 70s, in the news because she had recently invented MARC--and now MARC is on the way out.
* PCs did not exist back then—in Library School, we had to sign up for time on the University’s mainframe computer in order to run our COBOL programs which we were learning to write—and before running the program, we had to create a deck of punch cards which told the computer what to do!
* Two months ago, the venerable Dutch company, SWETS---known to all us I’m sure--declared bankruptcy… they have been around, serving the library world since 1901.
* Am I the only one here who can recall learning how to search DIALOG in Library School, when that was also an exciting new information tool?

My point is simply that many of the things we take for granted as being standard parts of the library world become outmoded, disappear, and are soon forgotten… and, although I am sure plenty of you will disagree with me, I think academic libraries being in the reserves business is going to become of one of those.

My own involvement in reserves dates from that early era also, because my boss trusted me--even though I hadn’t finished my degree yet---to be the head of the Reserve Library at the University of Buffalo. The Reserve Library was housed in a separate building and open 24 hours a day. I used to have to show up there in the middle of the night from time to time, to keep my student workers on their toes and convince them that they were not being paid to goof off!

It was common then for undergraduate reserve libraries to have a collection of what were considered to be essential books all college students should read, and so our shelves were lined with them, at least 15 copies of each, although no one ever wanted to borrow one!

Instead, we did a brisk business checking out books which professors had put on Reserve just for the current semester. Coin-operated photocopiers were also a very new thing back then, so students did not make a quick copy and run out the door like they do now, because it cost 25 cents a page, which was pretty expensive for that time… believe it or not, you could buy a gallon of gas for a quarter, so paying 25 cents for a piece of paper seemed like a lot. Instead, they stayed there for hours on end and took notes by hand. It looked like just like this:

**(SLIDE 2)**

I left academe for a public library job in 1972, but when I came to the University of West Georgia in 1991, reserves had not changed a whole lot, except that photocopiers were ubiquitous and cheap, so students who checked out reserve items didn’t usually stay in the Library very long.

However, within a very few years, the Internet also suddenly sprang up, and we soon realized that it would be ideal if our students could access some of their required readings on the web instead of checking out flimsy photocopies at the Circulation Desk.

I was aware of Docutek, however at that time we could not afford it--therefore in 2000, our Systems Librarian devised a way for us to do this on our own, without having a purchased system, by creating a series of scripts which automated the process for us. At the time, it felt like such a huge improvement, that I presented about it at a regional conference a few year later. My presentation was entitled, “A Simple E-Reserves System,”

**(SLIDE 3)**

but after reviewing it recently, I can’t imagine what I was thinking, because it was FAR from simple!

Our homegrown system required that we first scan the documents, then run a script to create a directory on the network for that class, save the files in that directory using (for consistency and ease of identification) a file-naming convention that I established, and create a password—which was then provided to the instructor for distribution to the members of the class.

**(SLIDE 4)**

It may not sound that hard, but when you see the screenshots illustrating the process our poor Reserves Assistant had to follow, it’s painfully obvious how complicated this actually was!

**(SLIDE 5)**

**(SLIDE 6)**

For one thing, after scanning and saving a copy of the document in PDF format, we almost always had to add a source note to it, using the Comment feature in Adobe, because professors rarely wrote the citation on the document as instructed, or provided a copy of the title page of the book It came from, despite our insistence that we needed this in order to abide by copyright regulations! In some cases, I actually had to track down the source myself, because they had no idea where it came from! This was often challenging, time-consuming and a bit irritating too ☺

Here’s a glance at a few more of the steps in our so-called “simple” process!

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**(SLIDE 8)**

**(SLIDE 9)**

**(SLIDE 10) *(end with MRES)***

As you can see, if you are old enough to recognize it, this is from the era of DOS commands—which a lot of you are probably too young to have ever used!

**(SLIDE 11) – set password**

**(SLIDE 12) – upload files**

Access to the lists of classes was provided on our Library homepage, but we were firm about not giving out the password to students who called or came to the desk asking for it--because we felt it preserved the integrity of our system and kept us from violating copyright: only the members of that class could access the materials, so they had to get the password from their professor.

**(SLIDE 13) – view e-reserves page**

After logging in, student could finally access the list of readings for their class:

**(SLIDE 14) – view list of articles**

**WHEW! Pretty horrifying, wasn’t it?**

**(SLIDE 15) – Copyright Police!**

Our Associate Director at that time viewed enforcement of copyright compliance as part of the mission of the Library. Privately, I did not agree that we needed to assume that authority, but on the other hand, once we started providing online reserves, I knew that we would be responsible for copyright infringement, were it to be discovered—and so I also began reading books, blogs, and participating in a seemingly endless series of webinars and online classes in order to improve my understanding of copyright law—which still makes my eyes glaze over every time I try to absorb it: TOO COMPLICATED AND CONFUSING!

Obviously, I wanted to do the right thing--but also I needed to be able to justify our requirements to the faculty, who wanted to do whatever they pleased, and felt like we were constantly trying to thwart them!

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Meanwhile, I had never stopped yearning for Docutek, particularly because I knew it included an easy way to access the Copyright Clearance Center when needed. So, I was ecstatic when our Director came back from a meeting and told me that the Director of Library Services at the University System office wanted to do a pilot project with Docutek among five libraries, and that he had persuaded her to include us—which made it affordable at last!

However, to my secret dismay, we finally got Docutek in late Summer 2005, and I knew that my boss was expecting me to get it up and running by the beginning of Fall Semester—failure was not an option!

Thus, for weeks and weekends on end, I spent practically day and night at the Library, learning how use Docutek, setting up Reserves pages for all our current e-reserves users, and scanning and uploading their materials to the new system. I knew I had to learn it intimately, so that I could confidently teach our Reserves Assistant how to do it so that she could take over once Fall Semester started.

To try to make it more convenient for students, I forced the faculty to add entries for their physical reserve items to Docutek, in addition to their e-reserves, so that students could see a list of all their required readings for a class in one place. Although a few faculty took to Docutek right away and really liked it, with some it was a recurring battle between them and the Library—so, although ideally we wanted them to enter all the bibliographic information for each of their items, we often caved and did it for them just to keep the peace—and to be copyright compliant.

With those who loved Docutek and didn’t want any help, we had a different kind of battle: monitoring what they uploaded to avoid copyright violations. Frankly, it was extremely stressful trying to get them to understand why they could not upload half or more of the contents of a book they did not want to make their students buy!

I had always been inclined to interpret Fair Use pretty liberally, but like everyone else, the Georgia State copyright lawsuit scared me pretty badly. I’m sure there is no need for me to review the history of that case with you, because it caused shockwaves throughout the academic library community all over the country.

Although I was comfortable that we were doing the right thing at West Georgia, I was not at all sure a court would agree with me, were we to be targeted as Georgia State was.

Back in 2009, the Georgia Board of Regents published a new copyright policy for the University System that clearly made faculty primarily responsible for copyright compliance.

**[SLIDE 16] – BOR copyright policy**

Instructors are responsible for evaluating, on a case-by-case basis, whether the use of a copyrighted work on electronic reserves requires permission or qualifies as a [fair use](http://www.usg.edu/copyrightthe_fair_use_exception). If relying upon the fair use exception, instructors must complete a copy of the fair use [checklist](http://www.usg.edu/copyrightfair_use_checklist) before submitting material for electronic reserves.

Despite our awareness of this policy, we observed that the teaching faculty appeared to know nothing about it, and at the time, it didn’t seem like a fight worth having--so the Library had continued to make the Fair Use determination for each e-reserve item instead of trying to get the faculty members to do it--but after the Georgia State case, I began to meditate more and more about how great it would be if we could transfer this responsibility from the Library to the professors!

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When our new Director came on board in 2005, she asked me for some statistics on e-reserves. No one had ever asked about that before, and I was shocked to discover that I could not get much in the way of statistics out of Docutek. It was disappointing to her, but also to me, because I just happen to like charts and graphs!

Because we have had ILLIAD for many years, and our ILL Supervisor is an ILLIAD genius who dazzles us regularly with the wonderful data she extracts from the system, I began to want to join the upscale library world by switching to ARes, made by the people who brought you ILLIAD of course! I sat in on some of their webinars and it was clearly an amazing system.

After a couple years of my whining, our administration had finally budgeted the funds to buy ARes this year. I was very excited, and figured that because of our ILL Supervisor’s familiarity with ILLIAD, she could also help us to implement ARes, which I presume, due to its sophistication, has a steep learning curve.

**However**, like the rest of you, I am always monitoring trends by following several different listservs, and just as I was ready to pull the trigger on the ARes purchase, I suddenly began to notice posts suggesting that some libraries were getting out of the e-reserves business altogether by using their campus’s online instruction software, such as Blackboard, to house required readings for students. Our campus had recently switched from a completely antiquated version of WebCT to Desire2Learn, and so I poked around on Google to see if any other campuses with D2L were doing this already.

The first one I came across was Radford University. They had an excellent LibGuide describing their approach to e-reserves and how to put items into D2L. I emailed them, and they were kind enough to give me permission to use their LibGuide as a template for one I would need to do, to provide support for our faculty if we made this change.

**At this point, I was off and running**.

I met with the Distance Learning gurus on our campus, told them what I wanted to do, and received enthusiastic support. They assured me that even if a faculty member was not currently using D2L to teach his or her class, a section was automatically set up for every class we teach—and they could use D2L just for e-reserves alone, even if they did not choose to use it for anything else. They promised me that they could design a customized widget in D2L specifically for this purpose, which was very reassuring.

Next step was getting buy-in from our Library administration. They were very much in favor of it when I pointed out that we would be saving money by not continuing to pay for our hosted Docutek account, or switching to ARes—plus it would be much more convenient for students, who are already accustomed to logging in to our online instructional system. In addition, we would be jumping on an emerging trend—so I got the OK to move ahead with this.

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Several months after I had begun my meetings with the Distance Learning staff, I realized that they were never going to manage to create that widget for e-reserves, which they had told me would make the entire process super simple for faculty. This was disappointing and scary, because we were already so deep into the process of transitioning away from Docutek.

As a backup, they agreed that if necessary—and with the faculty member’s permission—our Reserves person could be added to any class as a Graduate Teaching Assistant, so that he could create the e-reserves for them. This felt like a big step backward, because I really wanted to get out of the e-reserves business completely—but it was better than nothing and it was too late to go back—frankly, it would have been too embarrassing for me to admit to my bosses that I could not pull this off!

One of the new members of the Distance Learning staff (who was fired soon after, LOL!) created a tutorial for me, showing how to set up e-reserves in D2L that was even more dismaying! When I read it, I could hardly understand it myself, and I did not see how the faculty would be able to do it, unless they were already proficient users of the system.

So, although I had never used D2L myself, at this point I was feeling desperate, so I decided to try to learn on my own how this might be done. What I discovered was that the tutorial I had been given was WAY too detailed, and included lots of unnecessary information, if what you really wanted to do was put up some e-reserves and nothing more.

Once I got into the D2L system myself, I found a much easier way of doing it than what they had suggested, so I wrote my own tutorial and posted it on my LibGuide.

One thing librarians know how to do is teach, because we do it every day when we are trying to help people use our resources. Therefore, I made my D2L tutorial very simple, going step-by-step: first, do this. Next, do that. Then, do this…. So it was easy to follow and not intimidating. Needless to say, it was quite a relief to me to realize that the faculty **would** be able to do it, and that we could help them with it.

Because of the experience I had had when we introduced Docutek, I expected we would have to endure a firestorm of protest from the faculty once they woke up to the fact that Docutek was no more.

Therefore, we decided to make the switch at the end of Spring Semester 2014 because reserves business is always down in the Summer, so I thought we could get used to it ourselves at a relatively quiet time of the year and learn the ropes by helping the few faculty who do use reserves during the Summer. However, I cleared my calendar as much as I could for Fall Semester, because that was when I expected the you-know-what to hit the fan bigtime.

My original plans for this project had included having my night staff download everything we had in Docutek for faculty who were still here, and save all of their files to DVDs--but it became obvious early on that this was an impossible task, so I had concluded we would have to depend on the faculty themselves to download their own stuff if they wanted or needed to.

**[SLIDE 17] – Email: Important changes coming to Library reserves**

Knowing that it would take quite a while for the faculty to pay attention to this change, I started sending out emails to the ALL-FACULTY listserv in December 2013. I followed up with emails about every 2 or 3 weeks, gently urging them to make preparations for this switch--mainly, to get all their materials out of Docutek before it was too late, so they would have copies of what they might need in the future.

At this point, I had still not informed Docutek we were leaving either, because I was rather paranoid about whether they might cut off our access early if they knew. It turned out that they were totally nice about the whole thing, and we retained our login to the system right to the end of our contract.

Anyway, despite repeated pleas, I was contacted by only 4 faculty asking for help in retrieving their materials. This made me even MORE nervous, since I figured they just weren’t listening!

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Well, the end of my story is very anti-climactic: when I submitted this program proposal in the Spring, I expected to be standing here today telling you about all the horrible problems we had to solve as we implemented this change, so that you could learn from our mistakes and know what to avoid if you decided to try this yourself.

However, exactly the opposite has been true. Almost no one expressed any reservations about this move, asked for any help, or made any comments whatever! Some even thanked me, because they were already using D2L and wanted to do this anyway. We did offer to continue to do scanning and return a PDF to a faculty member via email if they did not have the capacity to scan themselves, and very few have asked for even that service.

Thus, our transition away from e-reserves was a bloodless revolution, smooth as silk, beyond my wildest hopes! We are now an e-reserves-free Library, although of course we continue to provide physical reserve items for the few who still want them, and there are less of those every year. ☺

Do I think for one minute that our faculty are being copyright-compliant? No, I seriously doubt it. But: not our problem anymore. Over and over again, I have urged them to read the Board of Regents Copyright Policy, but I can’t force them to do it. I do, however, plan to send out an annual reminder email, much like the yearly anti-harrassment email we get from the President at the beginning of every Fall Semester.

**[SLIDE 18] – Affordable Learning Georgia**

One thing I was not able to accomplish, was to tie this move in with our desire to encourage the faculty to get away from using expensive textbooks. The University System of Georgia has partnered with the California State University’s MERLOT project, to try to move System faculty toward using Open Access textbooks, in order to help make college more affordable.

I was honestly shocked when I checked the Bookstore prices of some of the most frequently required textbooks for Freshman and Sophomore level classes, so this was a movement I could totally embrace. The 2013 *National Study of Student Engagement* found that 1 in 4 Freshmen do not buy their textbooks—so is it any wonder that retention rates are so low?

The Georgia Board of Regents’ initiative is called Affordable Learning Georgia, and I am the Library Coordinator of this project for West Georgia. My hope was that in moving away from Docutek after so many years, I could use it as an opportunity to persuade faculty to view this as a new start, a chance to look at their courses with a fresh eye.

A major sub-agenda of the Affordable Learning Georgia project—and the reason why it is being run by the Library Services wing of the Board of Regents—is because we, like many other states, have a statewide database consortium that levels the playing field for students across the state by ensuring that each college and university has an adequate array of online databases available to them, which some could not afford to purchase individually. As you well know, these databases are extremely expensive, and the thought is that faculty could be making better use of these resources by creating reading lists for students from those databases, instead of relying on pricey textbooks. Unfortunately, that idea is slow to take hold, but we are not giving up, either.

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Now, our Circulation Manager, Katie Mitchell, will tell you how our abandonment of e-reserves has impacted her department, especially workflows…