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PRESIDENT'S CORNER
Mary Page, NASIG President

It's late summer already, and I'm still thinking about this year's conference in Minneapolis: Marshall Keyes; Leif Utne; the skits presented at the 20th Anniversary celebration; the outstanding programs and discussions. Members of both the Conference Planning and Program Planning committees deserve all the credit for putting together another terrific conference. Of course, even the best programs would fall flat without active audience participation, and thanks go out to all of the conference attendees for the energy and enthusiasm you shared.

I've had so much good feedback about both the program and facilities, and we now have data that support those informal reviews. The Evaluation and Assessment Committee has been hard at work compiling your comments and ratings, and the early returns indicate that the conference was an overwhelming success. E & A has already produced a "quick and dirty" report, which will be used by both CPC and PPC in their early planning for next year's conference. (We really do read and analyze the evaluations and take them very seriously in our planning.)

NASIG AND TECHNOLOGY

Over the years, technology has become an integral part of just about every NASIG working group. In recent years, we've seen the development on online registration, online volunteer forms, enhancements to the membership database, and the distribution of the *NASIG Newsletter* in digital form only. In many organizations, tasks such as these are assigned to in-house professionals, or they are

outsourced to consultants. As an organization of volunteers, we typically form a committee or some other working group as the need arises, and typically, the task is accomplished with a digital tool of some sort. We are now at the point where we need a thorough examination and evaluation of how NASIG uses technology, and also, how our various working groups are organized around technology. Are we using tools that are scalable and will be able to migrate forward? Are we using the best applications for the job? Should some of our working groups evolve and be re-charged with a new focus?

Last year, Steve Savage spearheaded a much-needed financial plan, which will put us on sound footing for the longer term. This year, I want to begin the process of developing a comprehensive technology plan for NASIG. I have asked Step Schmitt to study these and other issues related to NASIG's technical requirements. In a trial project, Step will function this year as NASIG's Chief Technology Officer, an ad hoc position that will report directly to me. Depending on how the technical evaluation proceeds, we may eventually formalize the CTO position, soliciting applications from the membership, much as we do for the *Newsletter* and conference *Proceedings* editor positions.

We are very fortunate to have someone with Step's expertise take on this critical role, and I am confident that the outcome will be a vastly improved technical infrastructure for NASIG.

Here's more news on the technology front: Anna Creech, the intrepid co-chair of the Electronic Communications Committee, has enhanced the "What's New" section of the NASIG website with RSS (really simple syndication) news feeds. For those of you who have yet to explore the blogosphere (I am a total newbie), this means you can get updates the minute something is posted to the NASIG site. I've started using one of the free online services to subscribe to a number of blogs (to find a service, just google "rss readers"). These services make it easier for me to stay current with the websites I've come to rely on for professional news and developments, and now I can add NASIG to my list of feeds (along with (blog.xrefer.com, keptup.typepad.com/academic, and others). Along with NASIG-L and the NASIG *Newsletter*, the RSS feed provides one more stream for keeping abreast of NASIG happenings.

That's all for now. Stay cool and stay tuned to NASIG by going to www.nasig.org/news then clicking on the orange XML box!

NASIG EXECUTIVE BOARD MINUTES

Elizabeth Parang, NASIG Secretary

Date, Time: May 18, 2005, 8:17 a.m.-4:35 p.m.
Place: Board Room 3 of the Hilton Minneapolis,
    Minneapolis, MN

Attending:
Steve Savage, President
Mary Page, Vice President/President-Elect
Denise Novak, Treasurer
Elizabeth Parang, Secretary

Members-at-Large:
Jill Emery
Beverley Geer
Judy Luther
Kevin Randall
Stephanie Schmitt
Joyce Tenney

Ex-Officio member:
Char Simser, NASIG *Newsletter* Editor-in-Chief

Guests:
Rose Robischon, incoming Treasurer
Adam Chesler, incoming Member-at-Large
Katy Ginanni, incoming Member-at-Large
Kim Maxwell, incoming Member-at-Large
Marilyn Geller, Co-Chair, 2005 Program
    Planning Committee
Emily McElroy, Co-Chair, 2005 Program
    Planning Committee

1.0 Welcome (Savage)

Savage called the meeting to order at 8:17 a.m., welcomed Board members and guests, and asked that each person introduce himself or herself. Savage informed the Board that Anne

McKee was absent due to a sudden illness earlier in the week. Savage reminded those present of the ground rules for the meeting: Incoming members may not vote but are welcome to join in the discussions. As Board members have read all reports before the start of the meeting, only those reports requiring action will be discussed in the meeting.

2.0 Secretary's Report (Parang)

2.1 Board Actions Since Jan. 13, 2005 Meeting

5/6/2005 The consensus of the Board is that Board members (current and incoming) WILL be eligible to win the 20th Anniversary quilt drawing but no other drawings.

3/30/2005 McKee moved (Geer seconded) that the Board adopt the financial plan as revised by the March 16th, 2005 conference call discussion. The motion passed unanimously.

3/14/05 The Board endorsed the slate of award winners selected by the Awards & Recognition Committee.

3/10/05 McKee moved (Emery seconded) that due to not receiving any Tuttle applications, we reallocate the money budgeted for awards to allow UP TO 6 student grant awards. The motion passed.

2/28/05 Geer moved (Schmitt seconded) that sitting members of the Executive Board or committees with primary responsibilities for managing any NASIG grant or award are not eligible for that award or grant during an award or grant cycle that is concurrent with their tenure on the Board or relevant committee. The motion passed unanimously.

2.2 Pending action items from past meetings

The list of pending action items was reviewed; no changes were made.

2.3 Mysteries from the manual

Although the Secretary's job description indicates that position will maintain a file of software license agreements, Parang has not found any in the Secretary's papers. Novak indicated the Treasurer has a copy of the license for the accounting software. Schmitt indicated that committees she liaisons with also have copies of licenses.

ACTION: Parang will create a list of license agreements for the Secretary's Manual and will obtain copies of licenses where possible. **DATE:** By Oct. Board meeting

References to maintaining mechanical of NASIG logo and preparing annual awards to be presented during the Annual Conference were agreed to be out of date and will be removed.

3.0 Treasurer's Report (Novak)

3.1 Report

Novak noted the format of the budget will change with the new version of Quicken being purchased for the Treasurer

3.1.1 Balance Sheet May 2005

3.1.2 2005 NASIG Budget 5-13-05

3.1.3 NASIG Budget Expenditures 2005

3.1.4 NASIG Detailed Financial Report 2005

3.1.5 2005 Minneapolis Conference Summary Report

Novak reported the hotel had been paid 50% of the cost up front.

3.1.6 2005 Conference Detailed Financial Report

Due to the extra expense of anniversary activities, this conference will probably just break even. Attendees suggested that PPC could try to offer more pre-conferences in the future, perhaps multiple half-day sessions with some in the morning and some in the afternoon. Possibilities could include more SCCTP sessions. Perhaps some synergies with ALCTS could develop topics; Emery indicated that as the incoming chair of the ALCTS Serials Section she plans to work closely with NASIG.

ACTION: Page will urge PPC to consider more pre-conferences and offer both morning and afternoon half-day sessions. **DATE:** At next meeting with 2006 PPC co-chairs 3.2 Update Conference Registrar section of manual

Novak reported online registration has caused many changes and the corresponding section of the CPC Manual needs to be overhauled.

ACTION: Novak, Savage and Tenney will rewrite conference registration section of CPC Manual.
DATE: August 2005

3.3 Training for new Treasurer, Rose Robischon, will occur beginning June 16, 2005. Novak noted that due to the new financial plan, the potential increase in workload of the Treasurer will need to be closely monitored.

4.0 Committee and Team Annual Reports – (note: these will be published in a special issue of the *Newsletter*)

Savage noted that during the past year there were a total of 23 task forces and committees.

4.1 Archives (Parang)

4.1.1 Charge needs to be overhauled

Archivist must create a manual; could check with similar organizations for examples of manuals. Some committee chairs have instructions as to what to send to the Archives, how long to keep records, etc.

ACTION: Set up a task force to create an archival policy for the organization.
DATE: Page and Parang will create a charge and appoint members by June 15, 2005.

The Archivist webpage needs a link to the list of what's in the Archives. http://web.library.uiuc.edu/AHX/uasfa/3502060.pdf

4.1.2 Responsibility for photographing realia/maintaining photo archive

One copy of photos of t-shirts and other souvenirs should be sent to the Archives and one copy to Creech for the web site.

4.2 Awards & Recognition (McKee)

Frick and Slagell will give out the awards during the opening ceremony. The committee will be smaller next year. The Board endorsed the committee's recommendation to continue requiring electronic submission, use of the identity matrix to track the blinding process, use

of the master scoring workbook, and the posting of all material in a Word format on the A&R Web site for committee review.

4.2.1 Documentation/manual

Slagell will be in charge of creating a comprehensive manual.

4.2.2 Relationship with Mentoring Team

ACTION: Page will talk with the A&R co-chairs about moving the Mentoring Team to A&R
DATE: By Oct. Board meeting

4.2.3 Advertising of awards

Information about awards must be included in the NASIG brochure.

ACTION: Publicist (Savage) will work with A&R co-chairs to develop more extensive advertising of awards
DATE: Report at Oct. Board meeting

4.2.3 Offer Horizon Award rather than Tuttle in "Champion" years

The Board endorsed the recommendation that the Tuttle, rather than the Horizon, award not be offered when the Champion award is offered. The Champion award is intended to be offered every five years as an anniversary item. The Board discussed whether the Champion award should use an application process (as was done this year) or nomination process.

ACTION: Ginanni to ask A&R to rework the award so it is a nomination rather than an application.
DATE: By Jan. Board meeting

The Board extended its thanks to A&R for the additional work completed this year in the creation of two new awards and for the improvements in the Mexico Student Grant process.
4.3 Bylaws (Tenney)

The Board thanked the committee for completing everything in a timely manner and doing an excellent job.

Appropriate people must revise a number of items to reflect the dues change, especially online forms and procedures.

ACTION: Ginanni will be responsible for finding a volunteer to track down everything that needs to be done. Schmitt noted that Oliver will do this for ORT.
DATE: By June 15

The Board discussed whether NASIG should continue to accept Canadian checks given the many problems with the bank. However, the Canadian government will not use credit cards for payments. The Board agreed to accept checks for $75 Canadian as dues payment because this was the Canadian equivalent at the time the dues proposal was made.

Committee chairs will be asked to turn in a list of changes needed on the web site for implementation in July.

4.4 Conference Planning

Next year CPC has been asked to have a special liaison to PPC. The incoming PPC and CPC people should try to meet at the current conference. The committee chairs must be sure to communicate with each other often.

4.4.1 Conference budget (Savage)

No sales tax needed to be paid on the a-v. The RFP for the a-v helped reduce the cost although it added to the workload. Having a standard a-v package in each room didn't actually add to the cost and did reduce the problems with moving equipment. Next year CPC must determine what the standard package will be before PPC discusses a-v needs with speakers.

4.4.2 Board to help with anything during conference? (Savage)

CPC had a sufficient number of volunteers to cover all necessary tasks. CPC asked if it would be okay to close registration during the Vision Sessions so all CPC members could attend them. Because that would conflict with publicized hours for the registration desk, the Board decided that registration must stay open during the Vision Sessions. Several Board members volunteered, however, to staff the registration desk for CPC during these times.

4.4.3 Drawing for quilt (McKee)

Martha Burk, the quilter, will draw the winning ticket

4.4.4 Fraudulent registrations, requests for visas (Schmitt)

Schmitt discussed fraudulent credit card charges. Information is available on the Web site for those planning to attend the conference as an educational activity. NASIG generally only provides letters of invitation for invited speakers (PPC) and award winners (A&R). Conference attendees apply at the U.S. Embassy in their own country. CPC and the Conference Registrar will not provide letters but will send an explanatory message. CPC should keep a list of people who request visa letters. Often there are suspicious items on the registration, ex., maximum number of guests, no sessions selected.

The Treasurer does refunds via check and will watch for suspicious charges. The Board recommended that credit cards be refunded via credit charge refund despite the fact this incurs an extra charge for NASIG.

4.4.5 Remaining conference events Board members should attend (Savage)

4.5 Continuing Ed (Luther)

Luther reported that OVGTSL did have several specific serials sessions. In answer to the question, was NASIG publicly thanked for sponsoring programs, Luther replied that brochures were set out and she knew that NASIG was thanked at the Potomac and North Carolina events. CEC had not planned for revenue generation this year. The NASIG CEC Online Education Task Force Final Report will be placed online. This task force did examine webinars and online courses. They encourage capitalizing on hot topics, partnerships.

4.6 Database and *Directory* (Emery)

4.6.1 Re-constitution/redefinition of the committee

The new technology group will address the re-constitution/redefinition of D&D.

4.6.2 Update D&D's tools

The pdf Membership *Directory* has not been updated since December. New tools caused problems due to lack of technology skills among members of the committee. The date of updating

of both directories needs to be prominently displayed. The committee should aim to update them monthly.

The Board thanked the committee for their work and especially McClamroch for stepping up and taking over the chairmanship.

4.7 Electronic Communications (Randall)

4.7.1 Change passwords for lists, list archives, private folders in web space, etc.

4.7.2 When to change passwords for NASIGWeb members only section

4.7.3 Weeding outdated files on NASIGWeb and email list archives

Savage indicated that passwords should be changed annually at the same time, July 1. The Secretary should maintain a list of who has passwords.

ACTION: ECC will notify the Secretary when passwords are changed or new ones created. **DATE:** Ongoing

Savage noted that the list archives passwords should be changed as should the password for the Board web space. The usernames can remain the same. ECC maintains a site management space on the web that contains a list of usernames.

The Board discussed the fact that the list archive software does not work well; this could be due to server response. The Treasurer has had problems with email. The message limit size has caused problems with the UKSG *Serials eNews.* ECC should address these issues with bee.net once all passwords are changed and the website is updated.

ACTION: Add to Working Calendar that all committees must review the content of their list archives to determine if any need to be retained when ECC purges the list archives in a few weeks. ECC must send a message to the chairs reminding them.
DATE: By June 15

Previously the Board had discussed having a second list for "NASIG chat", keeping NASIG-L for official announcements. There is some

interest in that or a Bulletin Board; this should be discussed at the Town Hall meeting.

ECC will divide the committee into web and list subgroups. Page announced that the 2005/2006 ECC co-chairs have been appointed, Creech will be in charge of the Web site and McElroy in charge of the lists. They were asked to farm out work to members and not do everything themselves. They will add links to ECC pages giving the two email addresses, list@nasig.org and web@nasig.org

The committee had recently changed the footer of NASIG-L messages; the Board requested that the change be reworded.

ECC noted that the Working Calendar is still organized around a June annual conference. Liaisons should remind committees to check ahead and make adjustments to their schedules according to the month the conference will be held.

4.8 Evaluation and Assessment (Schmitt)

The E&A recommendation, that a task force should be appointed and charged with exploring online evaluations, surveys, and evaluation and assessment software, will be part of the technology plan. The Strategic Support Task Force had investigated online voting vendors that also sold evaluation and survey software. Ginanni has the information from these companies.

4.9 Finance (Novak)

Novak reported the Finance Committee was dissolved, as specified in the new Financial Plan.

4.10 *Newsletter* (Simser)

4.10.1 Committee annual reports page

The editor could maintain a webpage allowing easy access to the annual reports in the *Newsletter*. Simser presented a lengthy draft she had created of the proposed NASIGWeb page; the Board decided to adopt this suggestion.

ACTION: All committees should link to this page from their webpage.

DATE: Simser will email committee chairs in June.

All task force reports should be included in the *Newsletter*. Articles about new task forces should be in the *Newsletter* and linked to the task force's webpage. The conference/calendar editor could maintain these pages. The technology committee should consider this function also as part of broader NASIG metadata management.

The Board thanked Simser for her work on the *Newsletter* and her great editing.

4.11 Nominations and Elections (McKee)

The Board thanked the committee for a job well done.

4.12 Online Registration Team (Novak, Schmitt)

French and Spanish languages forms for membership need to be added.

4.12.1 Outsource portion of work

Due to the technological skills needed, outsourcing should be considered as a long term solution; third party software does exist. However, having a third party handle updating the registration site might result in the site not including all the current functionality, such as selecting programs to attend. For the present, succession training is needed.

4.12.2 New opportunities

There are now more people involved, D&D for example. Problems exist such as having people with Access and SQL experience plus firewall problems for remote access. Now with online capabilities, members could renew and register at the same time.

4.12.3 Manuals

Because the current Registrar doesn't know next year's Registrar, training cannot necessarily take place. Thus a functional procedural manual is vital (See 3.2)

4.12.4 Technical support for CPC, PPC, Treasurer

The Board thanked ORT for the exceptional amount of work completed.

4.13 Mentoring Task Force (Tenney)

The Board renamed this group the Mentoring Team. (See 4.2.2)

4.14 *Proceedings* (Randall)

The Haworth contract should be scanned and placed in the Board web space. The three-year contract with Haworth will be up for renewal and a task force should be appointed to investigate alternatives.

ACTION: Page will send a copy of the contract to ECC to be scanned and placed in the Board web space.
DATE: ASAP

Haworth does pay for the editors to visit their Press. The Board could consider having co-editors sign up for two years but must keep in mind that this is approximately 15 months of work. The task force looking at publications should look at work cycles.

4.14.1 Editors contact speakers/PPC much earlier next year

The editors need to contact speakers even earlier; preferably as soon as the speakers have been selected.

ACTION: Parang will add to NASIG Working Calendar
DATE: ASAP

4.14.2 Pdf version in website?

Interest has been expressed in a pdf version of the *Proceedings*. First we must look into the Haworth contract on this, to see if it is mentioned anywhere, and proceed from there.

ACTION: Randall will investigate the possibility of including PDF versions of the *Proceedings*.
DATE: By Fall Board meeting

ACTION: ECC establish link from *Proceedings* page to handouts.
DATE: ASAP

4.15 Professional Liaisons (Schmitt)

Schmitt recruited many new liaisons. They are enthusiastic and their reports have presented a wide range of scope, content, length, structure, and style, which has consequently required extensive editing by *Newsletter* staff. Some liaisons only send one report but should be encouraged to report regularly, sharing information about their organization with other NASIG members. NASIG does not provide funding to liaisons. These liaisons are NASIG members appointed by NASIG to gather information from other organizations that will be of benefit to NASIG members; these reports are not official communications from the other organizations, and these liaisons are not appointed by the other organizations, though it is possible for the same person simultaneously to be appointed for a similar function within the other organization. The purpose is information flow. Part of the NASIG Strategic Plan is to connect with the broader serials community. The Board agreed the Professional Liaisons program should be continued for the 2005/2006 appointment year. Reports should be reoriented towards the *Newsletter* instead of the current orientation to Board meetings.

ACTION: Schmitt and Chesler will establish guidelines and expectations for the content of liaison reports as well as the frequency and structural format of the reports. The Liaison Reports Submission Form will be modified accordingly.
DATE: By Oct. Board meeting.

4.16 Publications (Emery)

A note will be placed on the Committee's webpage indicating the suspension of the committee.

4.17 Publicist (McKee)

The Publicist is the voice of NASIG and sends out all promotional materials.

4.17.1 Update membership brochures

Tenney suggested a quick update with a small number printed; the new Membership Committee could then do a thorough revision.

ACTION: Parang will do a quick update
DATE: By June 30

The Brochure should be put in the Board web space before printing. The final version should be sent to the Translators Team as a word document.

NASIG should have a notice about "Creative Commons" on its Web site.

ACTION: Emery will explore options among the Creative Commons licenses; if any seem appropriate for NASIG's use, she will recommend the Board adopt one as NASIG's default copyright/license control policy for most of our publications (excepting, of course, the *Proceedings* and any other publications which require involve other intellectual property management factors).
DATE: By mid-June

4.18 Site Selection (Luther, Page, Tenney)

Tenney visited Richmond, VA and reported it looks very promising for a future conference site. Virginia will be celebrating its 400th birthday in 2007. New Orleans is bidding on late May 2007. ACRL is meeting in Baltimore in 2007. The committee will pursue Canada for 2008. A suggestion was made that perhaps NASIG could collaborate with the group in New Brunswick that holds a serials conference.

4.19 Translators Resource Team (Geer)

The Strategic Plan has been translated into French and Spanish. These versions have been added to NASIGWeb. These translations required a lot of difficult work and the Board thanks the TRT for all of this hard work.

5.0 Task Force Reports

5.1 Anniversary Task Force (Geer)

Four skits are planned. Schmitt volunteered to videotape the skits for possible showing at next year's conference.

5.2 History Task Force (Tenney)

The task force had some difficulties getting responses from prospective interviewees , but nevertheless completed its work on schedule. Anne Mitchell, Publications Committee Co-Chair, then converted the approximately 40 pages of text to a layered html document and

made it available from NASIGWeb's Publications page.

5.2.1 List of Continuing Education events over the years

At the Task Force's suggestion, the Board will ask the Continuing Education Committee to compile a list of NASIG-sponsored continuing education programs during the past 20 years to add to this new NASIG History.

5.3 Online Survey and Evaluation Task Force (Savage)

The technology plan will address these issues. This task force has not been appointed yet.

6.0 Other/New Business

Page announced the 2005/2006 Board Liaisons and committee chairs: Chesler will be liaison to the Professional Liaisons; Emery will be liaison to CEC (Beverley Geer, Nathan Rupp, Co-Chairs); Ginanni will be liaison to A&R (Jeff Slagell, Sarah Sutton, Jessica Gibson, Co-Chairs) and the Translators Task Force; Maxwell will be liaison to Bylaws (Adolfo Tarango, Chair), the Mentoring Task Force, and Membership; Novak will be liaison to PPC (Rachel Frick, June Garner, Tonia Graves, Co-Chairs); Page will be liaison to the Technology Cluster – ECC (Anna Creech, Emily McElroy, Co-Chairs), E&A (Step Schmitt, Chair), D&D (Jo McClamroch, Chair), ORT (Schmitt, Chair); Parang will be liaison to Archives (Marie Seymour-Green); Randall will liaison to *Proceedings* (Meg Mering, Elna Sexton, Co-Chairs); Savage will be liaison to N&E (Philanese Slaughter, Chair); Tenney will be liaison to CPC (Paul Moeller, Wendy Highby, Co-Chairs) and *Newsletter* (Simser).
Page, Novak, and Tenney will be the Site Selection Committee for 2007.

6.1 Technology Plan (Page)

Page noted that so much technology is used by committees and on web pages that this factor should be examined closely. Page proposes a study for the next year. Schmitt will function as the Coordinator of the Technology Cluster, a sort of Chief Technology Officer. She will evaluate and recommend an optimum structure to implement technology that will support the work of the committees.

ACTION: ECC should overhaul and update the NASIG Web site
DATE: By May 2006

The training component needs to be addressed. End products include an inventory of current technology due by the Fall 2005 Board Meeting and a written short range plan due May 2006.

Having committee communications go through Board liaisons can lengthen the processes and create obstacles to quick results. Acknowledging receipt of emails is important.

Schmitt and the technology group will look at the bee.net relationship and software for surveys and voting. This year is a pilot test and will develop a list of requirements for a Chief Technology Officer

ACTION: Page will submit a draft charge for the pilot Chief Technology Officer
DATE: By June 30.

6.2 UKSG *Serials eNews,* NASIG ed. (Savage)

The agreement was scanned and added to the Board web space. This is a three-year agreement.

6.2.1 Bee.net limitation on message size

See 4.7

6.2.2. NASIG contributions

Six contributions are to be made each year, including announcements of things NASIG is doing such as continuing education activities, *Proceedings*, handouts. CEC should send announcements to the Publicist who will continue to forward items

6.3 Chairs Orientation Manual (Savage, Tenney)

Board members should send Tenney messages about items to add. Committee chairs should be asked to make suggestions.

6.4 New Board Members Orientation Manual (Savage)

ACTION: Savage will draft a New Board Members Orientation Manual
DATE: Due by Fall 2005 Board meeting

6.5 Brainstorming session (Savage)

Savage has already received some comments from members not able to attend.

7.0 Financial Plan. Phase 1: Initial implementation (Savage)

7.1 Tasks to be done this summer

During the Chairs Meeting, emphasize that any budget item request increasing more than 2% will require justification

7.2 Development and Membership Committees

ACTION: Savage and Page will create committee charges
DATE: By June 15

ACTION: Issue call for volunteers over NASIG-L
DATE: By June 22

The dues increase should generate the same amount of money being spent now. In the past at least 50% of the money spent came from surplus money earned at past conferences. NASIG needs to develop other sources of income. The new Financial Plan includes methods for this such as increasing membership, creating a development program, and creating revenue-generating continuing education events. All these take some time to realize. We want to create endowments for items highly valued by members, such as grants and awards programs, grants to members for continuing education. We need a plan for each endowment, including purpose, goals, sources of income, and investment strategy (need approximately $20 in principal for each $1 budgeted annually.)

The Development Committee will discuss plans for fundraising activities indicating where the money will go, how it will be managed, how it will be raised (ex. drawings, donations, check-off on renewal form.)

The Membership Committee will work on increasing the number of members in order to increase income as far as the Financial Plan is concerned. (Though increasing membership for financial purposes is only one purpose, and not the most important purpose, for this committee's work.) This goal should be in the original charge, both recruitment and retention. The Committee

must develop an understanding of why we lose members, why we gain them, and why members renew each year. Often they move into a job having nothing to do with serials or they retire. Currently there are 15 student members.

ACTION: As a first step to revive library school outreach, Maxwell will track down the CEC report and place it in the Board web space and will spearhead the effort to move forward. **DATE:** By Oct. Board meeting

Chesler asked, what is the cost per member of running the organization? Should library school students be enrolled for free? Savage approximated the cost per of member as being $68.

Paraprofessionals should be targeted as well. Chesler suggested starting a conversation on NASIG-L or some other list/bulletin board. We could offer members the opportunity to donate money towards student/paraprofessional members called scholarships. Luther suggested an initiative, "Pay $100 and renew yourself!" - $75 dues for self and one student member's dues.

Workshops should cover publishers and subscription agents as well as librarians.

The Texas Library Assoc. has done some preconferences with NASIG.

Schmitt noted that vendors should be able to discuss developments in their field. Emery reported that some publishers are pulling out of ALA because of poor treatment. Publishers want to learn how librarians are utilizing information; publishers can hold an Informal Discussion Group. Randall voiced the opinion that although focus groups had been rejected in the past, perhaps we should consider a time for this type of activity.

Chesler reminded the Board of the need to consider what vendors are contributing to the organization. Geer noted that we need to remind members that we are getting back to what NASIG used to do – "the future is what we were!" Other themes: NASIG as a community. Let NASIG be your library advisory board.

7.3 Revenue-generating continuing education events

7.4 Chairs Meeting: process of requesting budgets

7.5 Treasurer create method for managing the four budgets

Need to investigate if there are legal requirements for four separate budgets for endowments. NASIG needs a financial advisor specializing in nonprofits.

Randall moved (Schmitt seconded) that NASIG hire a financial consultant, whose specialty is nonprofits, to assist in the implementation of the financial plan. The motion passed unanimously.

ACTION: Novak and Robischon will look for a qualified consultant
DATE: Report at Oct. Board meeting

7.6 Peripheral concerns noted in the Plan

The latest version of Quicken will be purchased for the Treasurer's use. The Financial Plan clearly will increase the Treasurer's work load, so the Board must watch this carefully and respond as needed quickly; the Treasurer must be sure to keep the Board informed about this situation as more aspects of the Financial Plan are implemented.

The technology group will begin the review of all of NASIG's committees, services, etc.
Questions such as how far NASIG should go with corporate sponsorships need broad discussion among the membership. The UKSG has a lot of corporate sponsorship of its conference; however, this could change the character of our organization. Ginanni felt NASIG should seek vendor funding only as a last resort.

NASIG needs to come up with features at the annual conference that will make employers want to send employees to the conference. In the last few years, programs developed to appeal to publishers had low attendance. Perhaps better advertising is needed, for example targeted ads to SSP roundtables.

At the UKSG conference, of the 600 total attendees, about 50% are from the commercial sector. At the Charleston Conference, which has grown to about 900 attendees, approximately 60% are librarians and 40% are vendors. The Focused Vendor Demo last year was highly rated. Luther reported that SSP is marketing to libraries and suggested that NASIG needs to engage vendors in discussions. The UKSG plenary sessions had more people speaking and had people from outside, such as a banker. Members should be surveyed to discover their preferences for programming.

The Board should review the SSP Mentoring Program. Perhaps NASIG should hold a roundtable sponsored by CEC. Chesler suggested holding a pre-conference and session entitled, Introduction to Serials Librarianship for Publishers. He also indicated a need for opportunities for publishers to speak with librarians; the pre-conference Chesler and Maxwell are presenting is an attempt at this but we need to bring in a broad cross-section of the serials community.

NASIG programs have tended to focus on the how-to of librarianship instead of the broad issues. This factor may be contributing to the decline of commercial sector participation in NASIG.

8.0 Program Planning (Geller, McElroy, Page)

8.1 Tracking speaker evaluations

Geller and McElroy did create a speaker effectiveness tracking matrix that will be tried for this conference.

8.2 Alleviate pressure to contain AV usage/costs?

8.3 Continue with Vision/Strategy/Tactics distinctions?

The Board should get feedback from the vendors who participated in the Focused Vendor Demo as to the value to them of this session. Vendor testimonials could be used for future publicity. At this year's conference, this is a no-compete time. Next year this session should be scheduled earlier in the conference.

As the written report indicated, of 178 suggested programs, 34 were selected (19%). In revising the PPC Chairs Manual, Geller and McElroy confronted several issues. For example, if someone has presented at the last three conferences, should his/her proposal be accepted? The program is a mix of big talks by

well-known persons and also new people giving first presentations. The Board has left decisions about programming to the PPC. PPC does include information in the call for papers and has written an article for the *Newsletter* about program selection.

9.0 Remaining sessions Board members should attend (Savage)

10.0 Wrap up (Savage)

The meeting adjourned at 4:35 p.m.

TREASURER'S REPORT

TREASURER'S REPORT
Rose Robischon, NASIG Treasurer

NASIG remains in good fiscal condition. As of 7/28/05, we have over $280,000.00 in assets. This will change as we receive final bills for the Minneapolis Conference. The balance sheet appears below.

The balance sheet below reflects our income and assets as of July 28, 2005.

Balance Sheet 7/28/2005
(Includes unrealized gains)
As of 7/28/05

ASSETS	
Cash and Bank Accounts	
Charles Schwab-Cash	$ 31683.05
CHECKING-264	$ 141695.73
SAVINGS-267	$ 83803.66
TOTAL Cash & Bank Accounts	$ 257182.44
Investments	
Charles Schwab	$ 26640.51
TOTAL Investments	$ 26640.51
TOTAL ASSETS	$ 283822.95
LIABILITIES & EQUITY	
LIABILITIES	$ 0.00
EQUITY	$ 283822.95
TOTAL LIABILITIES & EQUITY	$ 283822.95

The bulk of conference invoices have been received and paid. Some speakers still need to submit requests for reimbursement along with receipts. All requests for conference reimbursements must be received by September 2005.

2005 Minneapolis Conference
Summary Report
1/1/05 Through 7/28/05

INCOME	
Conference Registration	$ 187729.52
Preconference Income	8648.90
Conference – Extra Meals & Souvenirs	3398.00
TOTAL INCOME	$ 199776.42
EXPENSES	
Credit Card Charges	$ 1200.37
Conference: Equipment Rental (includes AV)	8250.00
Conference: University of St Thomas School Of Law Room Rental	300.00
Conference: Meals	49979.50
Conference: Entertainment	1500.00
Conference: Souvenirs	700.00
Conference: Photocopying and Printing	614.82
Conference: Postage	827.74
Conference: Supplies	743.59
Conference: Speakers	8789.53
Conference: Shuttle	373.75
Conference: Other	804.05
Conference: Refund	3012.85
Conference: Marquette Hotel Anniversary Bash	29,425.10
TOTAL EXPENSES	$ 106525.30
TOTAL INCOME-EXPENSES	$ 93251.12

With five months remaining in the fiscal year, the 2005 budget is on track. Committees are doing a very good job of watching expenses.

NASIG Budget Expenditures
1/1/05 Through 7/28/05

Admin Board Expenses	$ -10,696.86
Awards & Recognition	-7,284.85
By-Laws	-334.76
Continuing Education	-1717.43
Conference Planning	-35.48
Electronic Communications	-3600.00
Evaluation	-31.83
Finance	-2839.43
Nominations & Elections	-982.02
Program Planning Committee	-44.25
Publicist	-31.07
OVERALL TOTAL	$ -27,573.48

21ST ANNUAL CONFERENCE (2006)

MILE HIGH VIEWS: SURVEYING THE SERIALS VISTA
NASIG 2006, DENVER, COLORADO, MAY 4-7, 2006

CPC UPDATE
Paul Moeller and Wendy Highby, Co-Chairs

Preparations for the 2006 NASIG conference continue to go well. We have reserved the truly lovely Red Rocks Visitor Center for the Thursday evening opening event. Red Rocks Visitor Center is located in the foothills of the Rocky Mountains west of Denver, in the midst of an 816-acre park. Panoramic views of the mile-high city abound and we will be treated to videos of noteworthy musical performances at the famous Red Rocks Amphitheatre. Go to the Web site for more information: http://www.redrocksonline.com/03_meetings/03_meetings.html. Our home base for the conference will be the Marriott City Center which is just a hop and skip from the many exciting cultural and entertainment opportunities that beautiful downtown Denver has to offer. The Conference Planning Committee looks forward to seeing you from May 4-7, 2006 at NASIG's 21st annual convention.

PPC UPDATE
Rachel Frick, June Garner, and Tonia Graves, PPC Co-Chairs

In a truly collaborative effort by the CPC and the PPC, the program theme for the 2006 annual conference in Denver is "Mile High Views: Surveying the Serials Vista." We had a lot of fun brainstorming about rocks, mountains, gold mining, and the legalities of turning 21 as we arrived at a theme to submit for the board's approval.

We received the Quick and Dirty Evaluation and Assessment Report of the 2005 annual conference from the Evaluations and Assessment Committee. This document will serve as a valuable planning tool.

Participants in 2005's 2nd annual Vendor Demonstration have been surveyed regarding their experience. We asked them to respond to the following questions: WOULD YOU PARTICIPATE IN ANOTHER NASIG VENDOR DEMONSTRATION? WHY OR WHY NOT? Their responses will assist with planning for future Vendor Demonstrations.

Sarah George has updated the committee webpage.

The Call for Proposals and Program Ideas has been published and responses are being received. Don't be shy about referring the Call to colleagues and encouraging them to respond. This fall we look forward to leafing through mounds of proposals.

CALL FOR PROPOSALS AND PROGRAM IDEAS
Rachel Frick, June Garner and Tonia Graves

The President of the North American Serials Interest Group will open the first session of the 21st annual conference on May 4, 2006 in Denver, Colorado. The Rocky Mountains provide a dramatic backdrop to a bustling metropolitan area that enjoys 300 days of sunshine a year. Denver has a lively downtown area as the city is overflowing with colleges, parks, museums, sporting events and more. Denver attracted people to its frontier atmosphere, starting off as a rowdy frontier and mining town. Today it still attracts individuals of the same spirit and they have helped it grow into a modern and sophisticated city. Denver's magnetism will be the perfect environment as we survey the serials vista.

To this end, the 2006 Program Planning Committee (PPC) invites proposals and/or program ideas for pre-conference, vision, strategy and tactics sessions. Please keep in mind the following:

• The PPC will review all submitted proposals for their content, timeliness, and relevance to the conference theme and reserves the right to combine, blend, or refocus proposals to maximize their relevance and to avoid duplication.
• PPC will treat all submissions as suggestions and guideposts.
• Time management issues and reimbursement guidelines generally limit each session to two speakers.
• Proposals may be suggested as one type of session and/or format and ultimately be accepted as any one of the other types of sessions or formats; this decision is the purview of the PPC.
• Vision and Strategy speakers are required to produce a written paper for the conference *Proceedings*. Because NASIG publishes its conference *Proceedings*, content needs to be unique for copyright purposes.

• ALL presentations must be original and not previously presented at other conferences.

For more information about the North American Serials Interest Group, please see: http://www.nasig.org.

NASIG has a reimbursement policy for conference speakers whose organizations do not cover expenses. For more information about this policy, please see: http://www.nasig.org/public/reimbursement_policy.htm.

SESSIONS TYPES:

Pre-conferences are in-depth programs that focus on practical aspects of the work and skills we perform on a daily basis. In general, these programs are several hours in duration, have limited attendance, and may include hands-on training.

Vision sessions are offered at no-conflict times to allow all conference attendees to participate. These programs generally deal with the larger universe of ideas and issues that may influence the serials world.

Strategy sessions generally deal with all or, at least, several segments of the serials world including, but not limited to publishers, vendors, service providers, and librarians.

Tactics Sessions are designed to address day-to-day issues and generally deal with one or two practical aspects of the serials world.

To suggest a proposal or an idea, please fill out the submission form available at: http://www.nasig.org/public/forms/idea.htm. The deadline for this call for proposals and ideas is September 1, 2005.

Inquiries may be sent to the PPC co-chairs, Rachel Frick, June Garner, or Tonia Graves at: prog-plan-l@nasig.org.

REPORT FROM THE 2005 AWARD WINNERS
Jeff Slagell, Awards & Recognition Committee

For the 2005 NASIG awards, grants, and scholarship, the Awards & Recognition Committee received numerous applications from worthy candidates. The review process was again blind for all awards. The identity of the winners was not revealed to the committee members until the scores were tallied and the winners were selected according to established criteria. For 2005, the committee awarded one Fritz Schwartz Serials Education Scholarship, six Student Grants, one Mexico Student Grant, and the first ever NASIG Champion Award. The awards covered the cost of travel; room; board; registration for the 20th NASIG Conference held in Minneapolis, Minnesota; and a one-year NASIG membership. In addition, the Fritz Schwartz Scholarship winner received $2,500 to help defray library school tuition and the NASIG Champion winner received a $500 award. The 2005 award winners are as follows:

NASIG CONFERENCE STUDENT GRANT AWARD

Jenny Benevento - University of Illinois at
  Urbana-Champaign
Martha Cannon - Drexel University
Rebecca Davies-Venn - University of Maryland
Christine Freeman - Texas Woman's University
Andrea N. Schorr - University of North Texas
Tammy Steinle - University of Missouri-
  Columbia

FRITZ SCWARTZ SERIALS EDUCATION SCHOLARSHIP

Sarah M. Vital - School of Library and
Information Science, San Jose State University

THE 2005 MEXICO GRANT

Claudia Haydee Barba Valdes - School of
Library Science, Faculty of Philosophy and Arts,
National University of Mexico

2005 NASIG CHAMPION AWARD

Tina Feick - Swets Information Services Inc.,
Vice President, Customer Service for North
America

One of the requirements of the student grants and the Fritz Schwartz Scholarship is to provide feedback about the conference experience. Below are their responses to the Awards & Recognition Committee's questionnaire:

Why do you feel it is worthwhile for students to attend a NASIG conference?

Attending NASIG provides students with the opportunity to begin networking with professionals in the serials information industry. This interaction allows students to begin building relationships and acquiring a solid understanding of serials operations. In addition, attending the conference promotes growth and personal development for aspiring serials professionals.

NASIG provides a very friendly, casual introduction to conferences for students. The practical nature of the presentations offers a more realistic view of what is really going on in the library world, an experience which will be invaluable when students are looking for jobs. It puts students in touch with practitioners in the field and allows us to ask questions and find mentors. It also puts us in touch with people who are looking for new librarians in this specific field.

I think it is important for students to become involved in professional organizations as soon as possible. For one thing, continuing education in the library profession appears to rely heavily on peer-to-peer knowledge sharing. It is obvious to me that I am learning at school only a fraction of what I will need to know on the job; and while on-the-job-training is important, it is very important for librarians to learn from their colleagues at other institutions. I think this is particularly important in the serials field, which is highly specialized. The NASIG conference

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provides an important opportunity for the student to experience all the benefits of a professional library association before graduation.

Attending a NASIG conference allows students to get a feel for what librarianship is all about. Students will have the ability to see what a professional library conference is like, and if the student is interested in some aspect of serials, it allows them to gain more knowledge of their area of specialty. It is also a wonderful networking opportunity for students to be able to meet other librarians, and also to meet potential employers.

I feel it is worthwhile for students to attend a NASIG conference because of the rich and varied experiences that it provides. One is exposed to all aspects of serials issues, the trends, the "crisis", the conversion of journals from print to electronic, negotiating deals and licenses. The conference is unique in that it provides a forum for librarians, vendors and publishers to talk about issues and figure out ways to improve communications, thereby making for better service and understanding. In the various strategy and tactics sessions, librarians and vendors were able to talk about the effect of rising journal prices on library budgets, and how the cancellation of subscriptions was affecting everyone, libraries, vendors and publishers. Attending the different sessions – vision, strategy and tactics would help a student understand what happens in real life, and help prepare them to go out into the world. At times it was hard to decide which of the sessions to attend, but because they are repeated it was a lot easier to attend more sessions. For a student the conference could open up new areas of opportunities not considered before.

I feel that the conference is beneficial because it offers the opportunity to network and to meet people currently working in the technical services field. As students we were able to get ahead of the learning curve and find out about technology innovations and also issues currently being faced by professionals in the field we will hopefully soon be entering.

The NASIG conference was as personally enjoyable as it was informational and enlightening. I met and compared experiences other student peers of different backgrounds and varying levels of library experience; and through informal chats, I learned the ropes of the field and the NASIG organization from field veterans. These informal meetings and chats, and the inevitable professional networking, are experiences that are not always in today's trend of distance learning or online programs in the library science field.

How did attending the conference benefit you personally?

Attending this year's NASIG conference made me realize that there is a whole world of serials specialists that are just waiting to be discovered. Each with his/her own unique perspective on the past and present nature of serials. The benefit of being a NASIG member is being able to meet many of these professionals all in one place, and learning from their experiences. Personally, the conference made me think carefully about my career goals and how I might implement all that I learned into my professional career.

Personally it allowed me to "compare notes" with students in school's across the country and librarians in all types and sizes of libraries. I learned a lot of skills from the sessions I attended that I can take back to my professional positions and use to further my career. Finally, I met many professionals that I will continue to be in contact with.

I am particularly grateful that NASIG was my first library conference. I have heard from many librarians how large and overwhelming ALA can be. The NASIG student award program was a wonderfully personal introduction to professional library conferences. The personal attention paid to each student- from travel to mentor to help with selecting sessions was amazing. I benefited from talking to so many librarians, all invovled in serials, yet from different types of institutions. The sessions were interesting and informative as well. I also enjoyed the time I had to get to know some fellow students interested in serials.

Attending the conference personally benefited me because I was attending a conference that focused on my job and my interests. I had attended other library conferences and did not feel like they offered programs that would help me in my job. NASIG allowed me the opportunity to learn new things that I could immediately come back to work and use.

It was a privilege for me to attend a conference that was such a great success, well planned and executed. This was a testament to the hard work that had been done by the different planning committees. As a student grant award winner, I could feel the enthusiasm and excitement of the committee members, as they kept in constant communication informing us how to register, travel plans, and becoming a part of the mentoring program. Our mentors were there to help us get the best out of the conference by sharing their experiences with us, and I have been able to continue communication with my mentor after the conference. I was really excited by the time I got to Minneapolis, the size of the conference was also ideal – about 600 attendees, a good enough size that made me feel a part of everything. As award winners, I must say we were treated like royalties, the very beautiful plaque, the 20th anniversary T-shirt, and just generally being acknowledged and made to feel very welcome.

I must comment on the abundance of food throughout the conference, almost all the meals were included in the conference fees; we did not have to worry about going out to find food that gave more time to concentrate on the sessions. There was always food around, main meals, snacks, cake, brownies, tea, coffee, and soda. The 20th anniversary dinner was very special, held at the beautiful Windows on Minnesota restaurant with a fantastic view of Minneapolis/St Paul. A well laid out buffet, with a couple of anniversary cakes. Attendees were then treated to 3 skits looking at past aspects of NASIG's life – Dorm life, the Workshop and Journal Costs all in a light-hearted vein.

Some of the sessions I attended helped me to better understand topics that I had studied in library school or that I am facing in my work situation. Open access, renewals, negotiating licenses – how many users are allowed, onsite and off site. With the conversion of a lot of print journals to electronic format, librarians worry about the archival nature of the material, are they going to be available in the next twenty years? I found the tactics session "Serials librarian/Non-traditional Careers" very informative, we looked at areas that librarians could use their expertise like working for vendor companies and publishers, not just libraries.

I was able to meet law librarians that currently work in technical services and make valuable contacts for the future. This will be a great benefit when I begin my job search during the next year. It was also very interesting and beneficial to meet the other award winners and be able to talk about the similarities and difference in our programs, in effect comparing notes on our experiences.

Being new in the library field has been an intimidating position. I haven't known the vernacular and conventions, and such unawareness has affected not only professional development, but overall comfort. I was nervous coming to the conference, not knowing anyone, and very conscious of my own newness to the field; but very quickly, I was at ease with the friendly, colloquial atmosphere. Not being intimidated or nervous made it possible for me to meet new people and ask questions with fear of being belittled.

Did attending the conference influence your career plans? How?

Attending the NASIG conference reinforced my desire to become a serials librarian. I have been working with serials for six years and have grown to appreciate the work that I do. As a member of NASIG I can continue my interest in serials work on a professional level and interact with individuals who share my same career interests. Additionally, the conference allowed me to seriously consider employment opportunities outside of my home state.

It definitely showed me the many different situations and organizations serialists work in. The large range of careers available in this area, and the wide skill set needed for such positions was made clear through this conference.

I have been wavering between electronic resources and reference. As I have only had experience at two large universities, I thought it had to be an either-or decision. Speaking to librarians at NASIG really showed me that there are many options- such as working at a smaller college where I can do e-resources while continuing to keep up my reference skills.

Attending the conference influenced my career plans by jump starting my eagerness to start looking for employment. Being at the conference made me realize just how much serials knowledge I have and that I am really ready to start applying for librarian positions. Attending

the conference gave me confidence in myself and in my schooling.

It widened my views of the range of careers that are available to me, it also increased my awareness of the complexity of negotiating a license, since coming back I have signed up for the course "Licensing Principles for Information Professionals" because I feel that it is important to understand the licensing process as it plays a big part in the day-to-day operations of all libraries and information centers. Contracts for electronic journals and databases have to be negotiated and signed, and it is important that libraries maintain their rights under fair use.

The conference helped with my career plans to the extent that it helped solidify my belief that the technical services field is one that I want to be involved in, in some capacity. I think it is really important to have an overall understanding of all of the components of an organization in order to effectively operate within it.

I am unaware of what the job market will hold for me when I need to begin paying back my student loans but by learning as much as I can about the different areas of a library I am going to be able to present myself as a viable candidate in multiple areas.

After talking with other serials librarians and seeing through the workshop that so much growth and possibility still exists in careers related to serials, I have definitely given serials librarianship a serious consideration. In fact, the new directions of information storage and serial publications have made the serials librarian an even more important contributor to library function. It will be exciting to be entering the library field during a time of such important transition, and doing so in a position related specifically to serials will be one of the best ways to contribute to laying the groundwork for the position.

What suggestions do you have for the 2005 NASIG Conference Award Program?

Keep the mentor program active! Mentors are a fabulous idea. My mentor was awesome! She spent a great deal of time ensuring that I got the most out of the conference. I learned a lot from my mentor and it helped that she introduced me to several members.

Have wireless access at the conference and presentation slides available during/before presentations so that participants can follow along and follow live links in the presentation.

I really think the program is exemplary. The only thing I can think to suggest, is that for one of the dinners or lunches, maybe assign students singly or in pairs to a group of librarians. I think the students tended to stick together, and that sometimes it was difficult to "break into" a table of librarians who already knew each other.

Advertise it as early as possible, identify personal contacts in as many schools as possible, use the SLA chapters of schools, send flyers, and use the listserv. Provide speakers who would make students aware of the existence of NASIG. Also in addition to sponsorship for the conference, a token amount of say $500 could be given that a student could use towards books etc. The date for the conference is also important, if it falls in the middle of exam week or the last week of classes when papers and projects are due students will not even bother to send in an application. I would be available to act as a liaison between NASIG and the University of Maryland and Catholic University, the two library schools in the Washington DC area.

It would have been great to have a part of the reception or a meal where people who work in different library types could congregate together so that the students could visit with people that work in the field(s) they are interested in. Perhaps it could also be accomplished by adding a section to the roster that listed the participants by type of institution so that if we wanted to identify those individuals it would be more convenient to do.

A discussion forum about getting a job would be really helpful the students, this would be an opportunity to learn about other's experiences. We began discussing the topic in the presentation on giving an effective presentation and it was really informative.

More publicity of the student grants, and the organization itself, would only enhance interest. I only happened to find out about the award through an out-dated list of scholarship opportunities maintained on the SJSU School of Library and Information Science's webpage. Asking library schools to annually update the

deadlines is hard; they always have so much to do, so such requests seem to fall by the wayside. But maintaining a webpage about the awards on the NASIG page, and publicizing the link to the page, would help. Not only would it provide correct information, but it could also add more information about the awards (and the benefits of the awards) than the sentence or two summary provided on library school's websites.

Additional comments or suggestions?

It was a pleasure to be part of the student grant program. I made many friends and acquired a lot of useful information. I look forward to being a NASIG member for many years to come!

Thank you so much!

Thank you for a wonderful opportunity, and a great learning experience! I particularly enjoyed Marshall Keys opening vision talk, and the Electronic Resources Workflow tactical session. The Workflow discussion presented by librarians from two different institutions, College of New Jersey and Auburn College, was very useful, showing how different colleges are dealing with the switch to electronic resources in terms of who actually does what. I learned that solutions are varied and depend on the resources and culture of the institution.

As was mentioned in the town meeting, open the grant up to paraprofessionals, have a sliding membership rate, possibly a student membership. Have the town meeting on the last night so more members would be able to attend. I also think that efforts should be made to increase awareness of the organization, and the excellent job being done to promote serials interests,

I would like to take this opportunity to extend my sincere thanks and appreciation to NASIG for awarding me the student grant; I know that I will always remember the experience, of being part of the 20th anniversary celebrations. I am looking forward to attending next year's conference in Denver, Colorado.

The informal nature of the conference is excellent. It really made me want to return to future conferences.

As the thought goes, rookies learn from veterans; but just as importantly, veterans can learn from rookies. As such, it might be nice for more of a chance for new members to formally interact with veteran members. Our knowledge and skill set are smaller, but we also bring new ideas and minds eager to try new things. Maybe small roundtables or informal discussion sessions dedicated to "trends in library school" will give veteran members an idea of what the next generation is learning and bringing to the field.

PRECONFERENCES

Serials Cataloging Cooperative Training Program (SCCTP)
Serials Holding Workshop
Julie Su, Head of Serials Unit and Digital Resources, San Diego State University;
Catherine Nelson, Head of Serials Department, University of California, Santa Barbara
Reported by Janet Chisman

Julie Su, Head of Serials Unit and Digital Resources, San Diego State University and **Catherine Nelson**, Head of Serials Department, University of California, Santa Barbara presented the full-day "SCCTP Serials Holdings Workshop." The presenters' expertise and the diverse experience of the twenty-five workshop attendees helped create an excellent learning environment where questions were brought forward and resolved. This blend of experience, knowledge and a questioning attitude helped supplement the information in the workshop manual which each participant received for this pre-conference. This Trainee Manual is packed with over one hundred fifty pages of information and will be a useful reference when participants return to their various institutions and begin to implement the MFHD.

The sessions began with an overview of the Z39.71 standard for the display of information and the MARC Format for Holdings Data (MFHD). The MFHD handles the structure and coding of the data. This module put the

standards in context and cited reasons for using MFHD. From there we quickly moved into the details of MFHD and the leader from MARC field 001 through 852. Time was primarily spent on sessions four and five which explained how to record holdings and patterns. Holdings information is recorded in two different fields that are paired and linked. Fields 853 (serial), 854 (supplement) and 855 (index) include the captions and the publication pattern while fields 863, 864 and 865 contain the enumeration and chronology. The fields are linked through the 853 subfield 8. Pattern information is also coded and used for prediction of expected issues and, optionally, for recording compression and expansion of existing holdings. Changes in a pattern require a new 85x. The various associated subfields within each field were also covered. Session six dealt with textual holdings which can be used to enter holdings in a free-text format combining captions with enumeration and chronology data in the 866 field. This unstructured approach is often used for retrospective holdings. The remaining sessions dealt with special problems and current issues.

The highlight for most of the sessions was the opportunity to work through some exercises. These were done together as a group or individually with discussions by the group of the various solutions. This was an intense, focused workshop which covered the basics and left participants with a good foundation for working with MFHD.

Serials Esperanto:
Helping Librarians, Vendors and Publishers Understand Each Other
Philip Greene; Kim Maxwell, Serials Acquisitions Librarian, Massachusetts Institute of Technology;
Adam Chesler, Assistant Director for Sales and Library Relations, American Chemical Society.
Reported by Allyson Ard

The half day pre-conference program, "Serials Esperanto: Helping Librarians, Vendors, and Publishers Understand Each Other," was designed to clarify the roles of these three key players within the serials' world. **Kim Maxwell**, Serials Acquisitions Librarian at MIT, began with a brief introduction. She first provided the goals for the session and explained the reason for using the term Esperanto. Esperanto is basically an artificial language created for speakers of different native languages that is meant to be neutral and easy to learn. This term speaks directly to the goals of this discussion; to create an understanding between the differing worlds of librarians, vendors, and publishers. This understanding is becoming more critical as well as more elusive during this ever-changing time of e-resources and their management. To reach this end, each panelist began with a general discussion of the history and terminology associated with each profession in relation to serials and then narrowed in on key details that often confuse or confound serials related situations.

The first panelist to speak was **Phil Greene**, a former long time employee of the subscription agent EBSCO Information Services. He described the over 100 year history of the subscription agent and aligned it with major events in world history as well as key events in the library/serials' world. Phil pointed to early points of cooperation between publishers, vendors, and libraries. In the 1970s these included working out claiming standards between publishers, agents, and ILS vendors as well as the refinement of publisher patterns. The 1990s brought many changes and concerns. The dollar plunged and library budgets were in no way able to keep up. Vendors' services such as collection development reports became indispensable to libraries during this crunch. Services expanded and improved but the cost to provide these services to libraries was not met with better revenues due to the budget limitations. As libraries had to make choices based on price; due to competition, vendors also had to focus on price instead of quality of service which was growing more expensive but was still fully expected. For this reason many vendors collapsed in the late 1990s.

After relating the long history of vendors, Phil described the "revolution" the serials' world is experiencing now and how the vendor has been affected. E-journals, consortia, and big deals are just a few of the current obstacles and opportunities. Vendors have developed new services to help libraries and publishers through these developments. However, many STM publishers chose to try to work directly with

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libraries. This initially affected the vendor adversely with profits going down and expectations rising. Libraries working directly with publishers had new problems arise like inaccurate order records, incompatible invoices and ILS systems, and multiple contacts and payments to manage. Publishers also developed problems with going direct. These included large "back office" expenses, need for more sales and service staff, and more overhead costs. As a result, libraries and publishers alike are in agreement that keeping the vendors involved is necessary. Libraries are requiring that publishers go through their vendors and publishers agree. Again, we see the cooperation that Phil mentioned that existed throughout the vendors' history. The cooperative resolution of past problems provides hope for our current concerns.

Adam Chesler, Assistant Director for Sales and Library Relations at the American Chemical Society, addressed the concerns of the publishing industry following Phil Greene's outline. He briefly covered the history of scholarly communication and then moved on to the typical departments within a publishing house. Marketing, Sales, and IT staff are the divisions that are rapidly growing but are commonly forgotten by those that publishers serve. Also misunderstood is the amount of time and resources that go into finding and providing content. New researchers increase annually by about three percent so content is pouring in. Some ninety percent of material received is rejected but that which is turned down still takes time and money to review. Another common misconception is that costs are decreasing for publishers with electronic production of material. This is far from true at the present time. Publishers still have to produce the print version of material and have added the electronic. Although there are no costs for paper, printing, and shipping as there is for print there is a whole new area of expenses concerning the publication of the electronic format. There is a tremendous cost associated with the technology and staff needed to handle electronic publication and the customer service associated with it. These misconceptions and others must be cleared up in order for libraries, vendors, and publishers to work together.

Once Adam covered the basic history and processes in publishing, he turned to some of the current issues or the "revolution" Phil

mentioned. The internet is changing the way people search, access, and read information and the industry must change with it. Some key issues that publishers and libraries are still working out include pricing, digital preservation, authentication, notification, ownership versus access, copyright concerns, and open access. Adam noted that the open access initiative could be seen as competition to publishers but should rather be taken as a way to better foster cooperation. Cooperation and communication among authors, libraries, readers, and vendors is what is needed to improve each constituent's stake in the serials world. His final words of wisdom from the publisher's perspective are, "when in doubt, ASK." Ask about what you do not understand and ask for what you want.

Kim Maxwell closed the panelists' focused discussions with the perspective from inside the libraries. As the audience was composed mainly of librarians, no history was needed. She instead began with the ways libraries can be equally confusing to vendors and publishers. She passed out a list containing twenty-seven different names for positions with similar roles within libraries and polled the room for others. How is the vendor or publisher to know who to talk to about ordering, resolving access issues, or new titles? Each library has its own structure and division of responsibility. Each publisher and vendor is unique as well. Resources are highly complex. For instance, one must first decide that the resource is needed and then has to find, evaluate, and chose the best fit for the institution from the myriad of platforms or interfaces available. There is also the problem of common terminology. Each publisher and vendor uses its own terms for things such as customer number, account number, or access code. This is why there is a need to establish a common language, a Serials' Esperanto, to deal with the complexity of the serials' world. To this end, Phil, Adam, and Kim compiled a glossary of terms used by publishers, vendors, and librarians which contains the definitions each would give for the terms listed. This glossary is a starting point for the communication and understanding needed.

The session ended with a long question and answer discussion. This was likely the most helpful portion as it created the open line of communication between publishers, vendors, and librarians as they were all represented within the audience. Everyone worked openly

with each other during this session to attempt to clarify the stance each holds and why. The tone of this pre-conference remained respectful and progressive which holds the promise that better communication will take place and can help resolve some of the complexity of the serials world.

BRAINSTORMING SESSION – MEMBERSHIP DEVELOPMENT
Held Thursday May 19, 2005, 9-11 a.m.
Notes compiled by Elizabeth Parang, NASIG Secretary

[Ed. note: this report is also available in the members only section of NASIGWeb
http://www.nasig.org/membersonly/index.htm.]

Approximately 15 people attended the brainstorming session, which included an active discussion for the entire 2 hours. These are working notes from that session. The announced topic was membership development within the commercial sector – getting back to what NASIG originally was intended to be.

- Publishers who don't know about NASIG could be targeted, especially smaller society publishers
- Publicize the Horizon Award better; target ads towards different sectors
- Give out NASIG brochures at state conferences
- NASIG could have a 'canned' program to send to other conferences for librarians, publishers, etc., such as state or provincial library association conferences, SSP, Timberline, Charleston, etc.
- Target organizations such as SSP, AAUP, and the Council of Science Editors; consider a one year discounted introductory membership
- Seek out email discussion groups that publishers monitor such as Lib-license, SSP list, ALPSP; these don't generally take generic announcements – must tailor subject to the list. Also consider the electronic newsletter for subscription agents, ESA
- Buy the Charleston acquisition conference list of registrants each year and send letter urging NASIG membership and one about our annual conference
- Could do continuing education with the Charleston Conference organizers, ex. mentoring, how libraries set budgets.
- Keep in mind that smaller publishers don't visit libraries
- Get publishers to see the value of NASIG:
  o Market theme: Let NASIG be your library advisory board

  o Publishers don't come to sessions by vendors; design programs with them
  o Consider another joint meeting with SSP
  o Perhaps 'trading' programs would be better; NASIG could sponsor a program at the SSP conference and vice versa
  o Develop a special brochure targeted to publishers: what we want, examples of programs, testimonials, meet decision makers, build relationships, learning from customers – understanding what customers want and how they use products
- Problem exists concerning whether commercial members can discuss a topic without mentioning their own product:
  o "Commercial" simply describes one sector of NASIG's membership and should not be viewed as a negative term
  o Need to have competing vendors speaking on the same topic
  o Must talk about products and services used everyday
  o No vendors/publishers/agents/etc. sales brochures at programs
  o Sharing information, not selling
- Need to educate members on the difference between sharing and selling
  o Perhaps hire someone to write a White Paper
  o Have a round table discussion and write up in the *Newsletter*
  o Could start a discussion on NASIG-L
  o Create a Best Practices publication with what to do and what not to do
  o Explain commercialism on the NASIG website
- Minority of membership thinks the commercial sector should be seen and not heard
- NASIG was intended to be a dialogue: inform each other using civil discourse
- Charleston Conference has a table with product/service brochures (they charge for

- leaving the brochures, perhaps NASIG should do the same)
- User groups could include more product groups
- Thursday could be used for more vendor demos and product user groups before the opening of the conference
- Subscription agents aren't the problem in the diminishing number of vendors; ILS vendors don't come as often as in the past
- Vendors are consolidating and so there are fewer of them
- New technologies tend to come from the vendors; need an informed constituency
- Panel discussions on general topics are good as are Point/Counterpoint type programs, such as working with your subscription agent (these tend to be longer programs)
- NASIG is a 'safe haven' for catalogers – a place for them to learn; need to let catalogers know why they benefit from learning about the commercial sector
- Perhaps, Why licensing is important for catalogers

- Cataloging for the Non-cataloger program at the Portland Conference in 2003 was very successful
- 'Serials Triangle' program was successful, could include publisher, subscription agent, librarian, ILS vendor
- Some states have very few publishers, but there are still a lot of small publishers
- Small publishers don't always know how libraries do business, how libraries choose publications
- Offer a free session for local publishers with a librarian panel, or a reception
- *Newsletter* could be used as an outlet for discussion, opposing views
- Librarians want better service, better access at a better price
- Analyze membership statistics for the existing commercial sector members and conference attendees by type of vendor/publisher to see who is missing: ILS vendors, database vendors, link resolver vendors, society publishers
- Inquire why people from Ingenta, Extenza, Highwire aren't here

VISION SESSIONS

Chaotic Transitions: How Today's Trends Will Affect Tomorrow's Libraries
Marshall Keys, Principal, MDA Consulting
Reported by Rebekah Kilzer

Just after breakfast, the room fills up for the first vision session of NASIG 2005. As **Marshall Keys,** Principal at MDA Consulting in Nantucket, takes the stage, attendees are waving to their colleagues, finding seats, and preparing for the first full day of conference activities.

Keys begins by reviewing his experience in serials, beginning with an undergraduate position at Rutgers, earning $1.10 an hour. He reflects that when he was in an academic setting, library catalogs and functions were entirely manual in stark contrast to the many changes which have occurred over the last 20 years, ranging from the advent of fax machines and OPACs to the Internet and Google.

Considering that the Internet is ubiquitous, Keys focuses on the increasing methods of self-expression and information gathering for emerging library users. He shares some examples of blogs and websites that demonstrate how people are using the Internet today.

The demographics of today's users are significant. He states that 90% of bloggers are under 30 years of age and 51% are between the ages of 13 and 19. They are not concerned with privacy and are highly focused on communication and interaction. They want personalization and access to information and communication at all times – and many users can get this via their cellular phone. Keys notes that asking students to "turn off their phone when entering the library" is a huge mistake.

Keys' views on the importance of libraries' adaptations to technology are just as creative and exciting as his presentation style. He suggests looking to our users as models for implementing new technological strategies for use in our libraries. He asks, "What is library service worth in the world market?" People are in search of faster, cheaper, and better ways of

doing things and getting information, but there are moral issues involved in this approach. Keys remarks, "You can't act locally without thinking globally." He questions whether we are better served by looking at our own interests as opposed to the needs of the community.

The title "Chaotic Transitions" applies to the subject of the talk in diverse ways. Keys notes that the changes happening in libraries are quick and can be chaotic or confusing to librarians who don't take steps to maintain a handle on the new developments in technology. New innovations are appearing at breakneck speed, making things more complicated, and the innovations are not limited to information technology. Academic publishing is also experiencing chaos of its own, including the

changes caused by "the big deal," Google print, and open access publishers.

After presenting a torrent of examples of new technologies, Keys states that the future of libraries is in presenting information the way the user wants it, not how librarians want to give it to them. He leaves the stage stressing the importance of focusing on our patrons when encountering new ideas. This fast-paced session was well represented when upon my exit, I heard someone say, "I can not remember what we are supposed to do next there was so much happening in there!" This is representative of the library world as it stands today but we need to remember to keep our futures in focus. Keys might say that the user provides the vision we need to continue to look forward.

20th Anniversary Special Program

Panelists:
Dan Tonkery, Vice President, Director of Business Development, EBSCO Information Services;
Susan Davis, Head, Electronic Periodicals Management Department, University at Buffalo, State University of New York;
Tina Feick, Vice President Customer Relations, Swets Information Services;
Connie Foster, Head, Library Technical Services, Western Kentucky University;
Jill Emery, Director, Electronic Resources Program, University of Houston
Reported by Gail Julian

The 20th Anniversary Special Program presented a retrospective of the serials industry and the formative years of NASIG. Previous NASIG Presidents and a former award winner and current Board member made up the panel. **Dan Tonkery** reminded us, in an often-humorous fashion, of the years 1965-1986 preceding the formation of the serials organization. In 1965, monographs were "king", while serials were less important. Approximately 70% of materials' budgets were devoted to monographs. Cataloging was done locally with cards shipped from The Library of Congress, and the IBM Selectric and the electric eraser were the rage in automation. Serials check-in was still performed on a Kardex, and Elsevier merged with North-Holland to create a title list of about 300. OCLC was a struggling company, and the CONSER project to create machine-readable cataloging from manual serials records began. The 2nd edition of the Anglo American Cataloging Rules was almost not written due to concerns over costs at large research libraries, and the "fair use" discussions began. Dan referred to the years 1964-1974 as the "golden age of acquisitions." By 1974, the number of

papers published began to grow and from 1974-1986 the "serials monster was being created."

Susan Davis began her comments in the year 1984 when a group of 16 American librarians traveled to the United Kingdom's serials conference where they were hosted by John Merriman. After the trip, a group was formed to study the idea of a United States conference. John Riddick, who provided the inspiration, became the first NASIG president. The first conference was held at Bryn Mawr in 1986 and attracted 250 people. Many NASIG traditions began at the first meeting; casual dress, late night socials, and volunteerism, which became the staples of future conferences. The title of the first conference was "Serial Connections--People, Information, Communication" with the emphasis on people. Susan entertained the audience with photos of early attendees and officers.

Tina Feick discussed NASIG's evolution as objectives and bylaws were drafted. John Riddick set about recruiting members to NASIG from both the commercial and library sectors

often through handwritten letters. The organization was heavily promoted in order to attract enough members to cover the cost of the annual conference. The membership goal was to recruit one third of the members from the commercial sector and two-thirds from libraries. In 1988, a position statement was drafted that confirmed the importance of publishers, vendors, and libraries in the serials information chain. This statement countered concerns of publisher bashing that had been raised at the 1988 conference.

Connie Foster continued to discuss the evolution of NASIG by emphasizing the importance of volunteerism and changes in technology. The NASIG *Newsletter* began as a five-page document compiled on a word processor and is today twenty-seven pages long and is available in PDF and HTML. The NASIG logo changed over the years as well while the conference has continued to be held over a weekend. The Board introduced new activities such as poster sessions and named an archivist to preserve NASIG's history.

Jill Emery closed the vision session by emphasizing, "people are the future of NASIG." NASIG has a strategic plan in place, has raised dues, and has added awards in addition to the student grant award of which Jill was a winner 10 years ago. These awards include the Horizon, Fritz Schwartz, Marcia Tuttle, and the newest, The Challenge Award. NASIG realizes the importance of mentoring, recruiting new members, and reengaging the private sector.

Painting America Purple: How the Media Can Help Bridge the Red-Blue Divide
Leif Utne, Associate Editor, "Utne Magazine"
Reported by Mary Bailey

Democracy should be a conversation where all the voices in the community are heard and where peaceful resolution and creative solutions of conflicts are fostered, stated **Leif Utne**, the associate editor of "Utne Magazine". The media has the essential ingredients to begin this conversation with both information and connections. They could exemplify the diversity of voices and unite us with the power of connecting people with information. However, the media is better known for the divisions it creates than its ability to unify people in a common quest for answers. The consolidation of the media creates more self censorship than ever before and the shrinking "news hole" (what fits between the ads) provides more sound bites than substance. What can the media do to fulfill their democratic duty?

Instead of dividing the United States into left and right, red and blue, Utne believes we need to learn to listen to others and find the shared experiences and connections that bring us closer to understanding each other. By providing opportunities for conversation and shared stories diversity can become unity and America can be seen as a "vast sea of purple". Learning to talk to each other and seeking to understand without trying to persuade others to our own beliefs can help us to see both sides. According to the *Let's Talk America* web page, democracy "requires keeping an open mind and honest, respectful listening and speaking."

Utne cited several examples of programs and projects, many developed by the alternative press, to bring people together, encourage conversations and to foster understanding. He reminded the audience that there may be more things we have in common than things that set us apart. Just as NASIG is a place where serialists can come together and share their common experiences and listen to each others' differences respectfully; we should find the commonalities of others who live in our shared democracy and listen respectfully to their stories. That some of the media are willing to try this is a sign of hope for our democratic society:

Projects and websites mentioned in Utne's speech.
- National Coalition for Dialogue and Deliberation: http://www.thataway.org/
- The September Project : http://www.theseptemberproject.org/
- The Council for Excellence in Government: http://www.excelgov.org/
- The Co-Intelligence Institute: http://www.co-intelligence.org/
- Let's Talk America: http://www.letstalkamerica.org/
- Café Utne: http://cafeutne.org/cafe/

STRATEGY SESSIONS

Access to Scholarly Literature: Publishing for an Extended Readership
John Cox, Managing Director, John Cox Associates
Reported by Elizabeth Lowe

In this session, **John Cox** presented a thoroughly-researched and tightly-argued analysis of the various trends and interrelationships that presently characterize the scholarly publications' industry. The presentation was based largely on surveys administered by Cox and others, such as JP Morgan, the ALPSP, UKSG, and CIBER.

Dating the interrelationship between modern scientific inquiry and scholarly publishing back to the establishment of the Royal Society in 1660, Cox utilized The Royal Society's Philosophical Transactions as one of the first scientific journals. Embedded in the methodology behind the publication of the Philosophical Transactions, Cox argued, are certain characteristics that still prevail today. Publication established ownership of the work; review by Society members ensured that only the better papers were published and publication disseminated research findings. The Philosophical Transactions served both as a record of research and as a vehicle for researchers to communicate with their peers; they were not writing for the public, and this does not seem to have changed over time.

Establishing the context for his analysis, Cox provided a statistical portrait of the world of journal publishing. The global serials' industry is about 8 billion dollars a year, with approximately 6 billion dollars of that comprised of STM journals and 2 billion dollars non-STM journals (e.g., those in the humanities, social sciences, etc.). If the global market for serials is 8 billion dollars a year, Cox commented, it is worth noting that it is smaller than the market for stamp collectors, which is 10 billion dollars. Although there are a small group of large publishers that dominate our perceptions of journal publishing, over half the market is in the hands of thousands of small publishers – some twenty thousand of them.

Two other long-term trends are propelling the industry towards dysfunction. First, there are twice as many scientists researching now than in 1975. Naturally, this increase in the amount of research enhances the demand by researchers for access to journals and multiplies their need

for avenues in which to publish their own research. But, during the same period, library budgets have only increased 40%. Secondly, library expenditure as a proportion of total university expenditure has declined from 4% to under 3%; university libraries are not hard resources and, as such, are not easy to sell. Moreover, faculties have failed to support the one faculty institution which supports their research.

From there, Cox proceeded to examine the issue of journal quality, particularly as measured by the ISI Citation Indexes. Cox explained that citation statistics are derived from a number of factors. They are driven by usage which, in turn, is driven by effective marketing and by availability. Because inclusion of a journal in a big deal increases availability (and hence also usage), it also multiplies the chances of being cited.

But the big deals are more advantageous to some than others. From the viewpoint of librarians, the results are mixed. Cox mentioned that early anecdotal evidence from the universities of Toronto and Warwick reveals that usage does not mirror libraries' purchases. Instead, 85% of the usage came from 52% of the purchases. A survey of academic librarians last year revealed a striking and explicit desire to return to individual title selection. But the recent partial retreat by librarians from the big deal did not detract from the overall attractiveness of buying in bulk. Moreover, the big deals democratize the selection process act and allow readers to decide what they want.

Cox next examined the role of aggregators. Aggregators are attractive to publishers because they allow publishers to reach new markets and new readerships. Institutions that would not normally maintain research collections will subscribe to aggregate databases. Moreover, the use of journal articles in undergraduate teaching has increased. But aggregators cannot replace print. Finance continues to be the principal driver of cancellations.

Cox then turned his attention to Open Access, which has been put forward as a viable option to

the current system. Open Access is the concept of information being freely available to everyone. But information can never be free: it takes time, effort and investment. Cox examined a number of problems endemic to a widespread adoption of Open Access, such as the issues of finance and sustainability.

The greatest impediment to Open Access journals is that researchers simply do not seem interested. Indeed, from the author's vantage point, there are three issues: first, only about one in twenty academics know much, if anything about Open Access; second, researchers want to communicate with their peers (having their research available to the public is, at best, a secondary consideration); and third, there is a general perception that the peer review of Open Access journals would be less stringent than that of the more established journals. Certainly, Open Access journals tend to be at the lower end of the citation index. Moreover, to most researchers, online big deals look just as "open" as Open Access. Unless researchers perceive that there is a sufficient incentive to publish in Open Access journals, Cox pointed out, it is unlikely that they will do so.

A more viable alternative is the relatively new Open Archives, particularly in the form of institutional repositories or subject repositories. Most publishers already allow authors to publish papers to repositories. Moreover, the Open Archives movement has received a boost from the recent directives of the NIH and Wellcome Trust to their researchers. But instead of thinking of institutional repositories in terms of being archives, Cox argued, we should think of them more as publishing entities, -- or, to be more specific, as analogous to university publishing houses. Their success may depend on universities making better use of repositories than most of them have with their own presses.

Cox assessed the role of branding in academic publishing. The journal is a brand of real significance to authors and to readers. The perceived reputation of a journal serves as a key device in both attracting authors and generating subscriptions. Nevertheless, institutional repositories if linked into the established journal infrastructure have the potential to subvert the existing publishing system and recapture the publishing process for the academy.

The session ended with audience discussions on publishing by learned societies and the problem of version control within institutional repositories.

Unique Identifiers in Libraries:
What Works, What Doesn't Work, and What's in (or Should Be in) the Works
Regina Romano Reynolds, Head, National Serials Data Program, U.S. ISSN Center;
Michael Kaplan, Director of Digital Products/Technical Support, Ex Libris
Reported by Masha Sapp

The presentation began with general background information on the form and function unique identifiers have in libraries, particularly in the current environment where precision is crucial to identification and electronic linking of resources. **Regina Romano Reynolds** began by discussing the ISSN and its role as a unique identifier for serial titles. She also explained the challenges that many serials' librarians face when working with multiple, dubious, or nonexistent ISSNs. The importance of ISSNs in the current electronic environment where they are used for searching/identification, de-duping, and link resolution was emphasized.

ISSNs are especially critical in connecting users to serial content via Open URLs. Link resolution software generally depends on the ISSN to identify the bibliographic elements of an Open URL. Therefore, ISSNs need to be interoperable. They must allow for importing and exporting data, migrating to new systems, various database management functions, and linking both from the OPAC to external files/Web pages and from databases back to the OPAC.

In January 2005, the ISO Working group began to revise ISO 3297, the ISSN standard. Their task entails re-tooling the ISSN so that it can operate in new systems as well as old ones. The revised standard must cover all continuing resources and provide for identification at multiple levels (e.g. products, titles, etc.). The group aims to develop new ISSN data

distribution and look-up services, reconcile its different uses in various parts of the world, establish an ISSN users group, and generally clarify and communicate the meaning of the ISSN. What exactly does it identify?

The group faces many challenges. In dealing with all continuing resources, they must decide how comprehensive their coverage of serials should be, and how selectively they should approach ongoing integrating resources. In assigning multiple ISSNs, there is a tension between the need to collocate titles and to identify different manifestations. Various users and resources must be taken into consideration: for instance, should calendars or new media such as blogs be included? ISSNs must be able to identify resources both at the manifestation, general product, level and at the title level, and should meet the needs of different users and user institutions.

One possible solution for identification at a higher level of granularity is a "collocating number," CN, which is a new name for a t-issn. This is not a new identifier in itself. The first-assigned medium-level ISSN will also be used for the CN. Every serial, whether current, ceased, or in more than one medium, will retain its regular ISSN along with the CN. In a cluster of MARC records related by 776 fields, the CN will be recorded in the 024. CNs will be machine-assigned to all new records automatically, and ISSN IC, International Centre, Paris, will assign them retrospectively as well.

As a result, while different manifestations of a serial (e.g. print, online, and CD-ROM) may all have different ISSNs in the 022 field of their bibliographic records, each *title* will retain the same CN in the 024 across the board, regardless of format, title changes, or different language editions. Its primary use will be in the link resolvers. Thus, the ISSN + CN presents a two-pronged solution to the problem of multiple ISSNs by acting as a collocating number while providing a way to distribute and synchronize ISSNs and relationship data among ISSN users.

Currently, the ISSN register maintained by the ISSN IC is the most complete and authoritative source of ISSN data. The database, which is regularly maintained, currently comprises over 1,125,500 records, with about 50,000 new records added yearly. The portal is available both on CD-ROM and via subscription to a Web interface. A new product proposed by the ISO Working Group is an ISSN Data Distribution and Look-Up Service. This service would focus on various relationship data; e.g. related ISSN and corresponding CN; earlier and later CN; different geographic and language editions etc. This product may eventually provide separate look-up, (online access) and subscription (data distribution) services.

The ISSN User Group, which emerged from the Working Group, held its first meeting April 28, 2005. This group aims to provide ongoing input to the ISSN Governing Board from user communities via representatives to the Working Group. It will also serve as a sounding board for Governing Board proposals.

In their outline for the revised ISO 3297 standard, the Working Group covers topics such as construction and assignment of the ISSN, collocating numbers, printing and display of ISSNs, ISSN metadata, and the use of the CN in other identification systems (such as DOI, "Info" URI, Open URL, and URN).

The revised standard of ISO 3297 will be finalized in Paris during the late spring/early summer of 2005. After members vote on it in July or August, the standard should be published some time in 2006.

Michael Kaplan proceeded to discuss other possibilities for unique identifiers (most of which already have a MARC field assigned to them). He began by examining the Serial Item and Contribution Identifier, or SICI. The SICI aims to identify both the item (issue) and the article (contribution), in a serial with a single identifier. This identifier will be self-derivable and self-decomposable, and would be unique down to the article level. The SICI consists of three segments delineating the item, contribution, and a control. Currently, databases such as JSTOR and OCLC FirstSearch use such unique identifiers to retrieve items at the article level.

The SICI has the advantage of being a meaningful number, capable of being broken down and deconstructed. Thus, the issue is not required to be "in hand" for identification. However, special characters (< ; : > ( ) etc.) are used as delimiters, because the system is designed for paper-based materials. This could pose a problem in some digital environments.

Another possibility is the DOI (Digital Object Identifier). Since the DOI is supported, maintained, and copyrighted by the DOI foundation, it may not be entirely suitable for an international standard. On the plus side, it is created early in the publication process and can resolve to anything (accepted as an Open URL element). However, the need for resolution is also a drawback. In addition, since it is controlled by publishers, it may not gain the same level of acceptance as some of the other options. There remains some question as to its longevity.

The Archival Resource Key (ARK) Persistent Identifier Scheme, on the other hand, is more convenient because resolution lies in public hands. However, it may be redundant with the DOI.

The SSDI (Standard Serial Document Identifier) and PII (Publisher Information Identifier) are assigned pre-publication for tracking purposes and have the advantage of predictable size, but there does not seem to be much interest in these at present.

The USIN (Universal Serial Item Name) is attractive because it is unambiguous, permanent, and brief. However, its need for

rules, like "name authorities," could present complications.

Various other international standard identifiers currently exist for different media: for example, the ISRC (International Standard Recording Code, for recordings of performing arts); ISMN (International Standard Music Number); ISAN (International Standard Audio-visual Number); ISWC (International Standard Work Code—identifies musical works for tracking royalties); and ISTC (International Standard Text Code—can be used for any textual work, and works well with FRBR since it identifies the work rather than the form).

The idea of non-material-based identifiers was also explored. For example, could a URL or a PURL be used as an identifier? A SAN (Standard Access Number)?

While there are many identifiers out there, they exist in a number of discrete niches, and there is no consistency among them. There is a lack of a system of worldwide library identifiers, and there is nothing at the package level. The best identifiers are persistent, actionable, interoperable, and capable of proliferating. Is it possible to have a number that would perform all functions?

FRBR and Serials
Steven Shadle, Serials Access Librarian, University of Washington Libraries
Reported by Jayne Sappington

The conference this year was filled with a considerable amount of valuable information. In this case **Steven Shadle**, the Serials Cataloger at the University of Washington Libraries, presented an update on FRBR (Functional Requirements for Bibliographic Records) with respect to serials. FRBR is a conceptual model utilized to illustrate the relationships between different entities at different levels. It is used to try to improve database management systems. FRBR is not a code, a set of rules, a data mode, a metadata scheme, or a system design. It is only a model. When implemented, it will group all the different variations of one title together under one entry as displayed in an online catalog. FRBR identifies three groups of entities in the bibliographic universe: 1.) work, expression, manifestation, item, 2.) person, corporate body, and 3.) concept, object, event, place. To date only the Group 1 entities have been worked on.

Steve presented an overview of FRBR by using an example of entity modeling to show how the parts relate to each other in order to better understand the Group 1 Entities. The overview gave insight into the relationships as prescribed in FRBR. Group 1 consists of four levels which are work, expression, manifestation, and item. The explanation of each of these entities was presented in a manner that was easy to comprehend and showed the audience the various relationships of the four levels. In addition he gave examples on how the FRBR model might be applied to serials.

Steve also provided information on the ongoing discussions regarding the development of the implementation of FRBR and the intent and meaning of the various parts of FRBR. He told the group that the serial community has not yet been very involved in the development of FRBR,

but they are beginning to be more involved through discussions occurring in the CONSER Task Force. He also informed the group about the largest discussion to date, which took place at OCLC. An international panel met for a workshop at OCLC to discuss FRBR in 21st century catalogs. Although these discussions are taking place now, it is not quite clear as to how FRBR can be applied to serials. For more information check out the OCLC website, http://www.oclc.org/research/projects/frbr.

Negotiation for the Rest of Us
Joan Conger, MLIS, Organization Development Consultant
Reported by Rachel Lee

More than a presentation, "Negotiation for the Rest of Us", hosted by **Joan Conger**, took the form of a lively workshop-style session. Attendees, comprised of both librarians and vendors learned the fundamentals of negotiation and effective communication skills and were asked to consider opinions from both sides of the negotiating table.

Joan Conger created a fascinating and challenging session. Having worked as a librarian in many different roles, Joan is currently working towards a PhD in Organization Psychology. A published author on the topic of Electronic Resource Management, Joan shared her knowledge and insight, facilitating an open and friendly discussion on what is often a divisive subject.

The session began with the group reviewing what they loved and hated about negotiation and with Joan asserting the co-operative and mutual nature of successful negotiation.

Attendees were then asked to consider the role of both the vendor and the library in the negotiating process. Joan illustrated that good negotiation is more than just "trying to win". There are both mutually beneficial goals in addition to discrete benefits, financial costs to both sides and gaps in information that could be filled as part of a successful resolution during license discussions.

The art of negotiating is to remain flexible and curious about the other party's situation – thinking creatively and continually learning is the key to emerging from the process with the best possible result.

For someone who is new to licensing on the publisher side, this presentation was a "must attend". Joan did much to demystify the process and offered not only some necessary skills, but also a fresh perspective on license negotiation.

Cross-Provider Search
Jenny Walker, VP Marketing, Ex Libris; Co-chair NISO Metasearch Initiative;
Amy Brand, Director of Business Development, CrossRef
Reported by Buddy Pennington

Co-presenters **Jenny Walker** and **Amy Brand** teamed up to present the efforts underway to facilitate simultaneous searching across information resources. Jenny Walker focused primarily on the NISO Metasearch Initiative, which seeks to provide recommended best practices and standards for metasearching. Amy Brand discussed CrossRef's efforts to develop a cross-provider search product and the competition it now faces with the recent launch of Google Scholar.

Jenny Walker began by examining how metasearching products will provide a more convenient and efficient research experience for information seekers. Prior to metasearching,

query forms were integrated into information resources and did not search beyond the resource itself. For a comprehensive search, an individual often has to search different resources using different search interfaces. Metasearching holds the promise of a single search interface that would search across information resources and provide a single set of results.

Although the terms are used interchangeably, metasearching is quite different from federated searching. With federated searching, metadata is harvested into a single repository that is then searched. Examples of federated search products include ENCompass, Elsevier's SCIRUS and Google Scholar. Metasearching,

on the other hand, involves searching metadata distributed in multiple information resources and then collecting, de-duping and displaying the results in a single list. There are real differences in the two approaches, and it is important to keep them in mind.

With that caveat, Jenny Walker then described the basic concepts of metasearching. Metasearching's "on-the-fly" approach has seen steady growth over the last five years. Metasearching relies on translators that connect the single search interface query to the different information resources. These translators map different fields from different resources to enable de-duplication and a single results list. Different approaches to metadata have appeared to enable metasearching. Some use Z39.50 or ZNG (Z39.50 Next Generation), others use proprietary XML schemas, and a few even use HTML screen scraping. So metasearching is here, is working, and several libraries are already using it. But the diversity of metadata standards poses challenges to make metasearch technology work as efficiently as possible.

At the American Library Association conference in 2003 a number of vendors, including EBSCO, ProQuest and Gale, convened to raise the issue of the varied metadata practices and their impact on metasearching. Something needed to be done, and NISO agreed to take the helm in developing best practices for metasearching. The NISO Metadata Initiative was born to involve all metasearching stakeholders. How can libraries, metasearch service providers, and content providers work together to create a win-win situation?

Formalized in January, 2004, the NISO MetaSearch Initiative created three task groups. The first task group was charged with examining access management, the second was charged with collection description and the third was charged with search and retrieval.

The first task group examined access management issues. This involved both authentication and authorization. Authentication is the process where a network user establishes a right to an identity. Authorization is the process whereby a network user receives the right to use the resource. The task group surveyed authentication methods such as proxy, IP, Shibboleth, Athens, cookies, and graded them with environmental and use case rankings. The task group recommended that IP authentication with proxy server and username/password remains the best authentication method for the present. Shibboleth has potential for the future, but is currently hindered by the fact that it cannot be used between the metasearch provider and the content provider but only between a user and a content provider.

The second task group focused on collection description. This involved two key areas: collection description and service description. For collection description, a collection is defined as an aggregation of one or more items. The focus is on the metadata used in collections since metadata is what drives both the description of a resource and how it is accessed. Dublin Core seems to be leading the pack of the different metadata standards. The service description is focused on standards of how to search the resource. Examples include ZeeRex and Z39.50 Explain. Also under discussion are methods of creating, maintaining and exchanging collection description and service access information. How can descriptions be auto-generated and how can they be harvested by others? Jenny Walker pointed out that many items have unique identifiers. For example the article has the DOI and the journal has the ISSN. However, the advent of metasearching is making it increasingly necessary that collections and even services have their own unique and persistent identifiers so that different systems can recognize them.

The third task group was charged with search and retrieval. It is conducting an extensive survey of current products and practices. Use cases are being prepared and analyzed so that models can be developed.

The NISO Metasearch Initiative members are planning a meeting to adopt an entry level protocol; a set of minimum standards to enable consistency in how search results are retrieved, displayed, sorted, merged and deduped. The draft of this minimum standard, the NISO MI XML Gateway (MXG) is being finalized. It is using SRU/SRW as a starting point, will recommend schemas for citation data, and is using the OpenURL 1.0 data elements as a starting point for a minimum metadata set.

Amy Brand, formerly with Ingenta and now Director of Business Development with CrossRef, then presented CrossRef's efforts to develop a cross-provider search tool and how CrossRef was literally scooped by Google's Google Scholar initiative.

CrossRef's mandate is to connect users to primary research online. This has been managed by using the persistent linking through DOI technology to enable links across publisher content. Publishers pay membership fees to participate in CrossRef. Members currently include 1,450 publishers and 550 libraries and consortia. CrossRef has over 16 million registered links for 12,000 journals, and with 10,000 DOI links added daily, the astounding growth of CrossRef's DOI database continues. They have expanded from linking to primarily STM journals to including persistent links for such items as books, images, datasets and working papers.

Why does CrossRef work? Its business model is neutral, its linking technology is persistent, and the metadata requirements are minimal, thus making it easy for publishers to participate. This persistent linking across publishers increases access to member publisher content and makes it a win-win situation for both publishers and researchers. The key to CrossRef's success has been its ability to get a large number of publishers to buy into it.

This careful approach to building consensus and collaboration between publishers means that it takes time to develop new initiatives. In 2001, publishers began discussing the possibilities of using CrossRef to provide cross-provider searching. The next year, the beta version of CrossRef Search, involving six major publishers, was launched. The feedback was mixed. Users were happy with it, but some of the CrossRef members were more hesitant about adopting it. The CrossRef board was also unsupportive. CrossRef developers went back to work on the second beta. Meanwhile, unbeknownst to CrossRef, a small group of publishers broke away from the effort and approached Google.

In 2004 the second beta version of CrossRef Search was launched. Again, user feedback was positive. This time the CrossRef board voted to move forward. But while CrossRef Search developers and the member publishers were hammering out the details, Google Scholar was launched upon the world. While CrossRef Search is still being developed and promoted on publishers' websites, Google Scholar is out there on one of the web's most popular search destinations. The collaborative model of CrossRef appears to be threatened as individual publishers flock to Google.

While CrossRef is focusing on the research literature as published and linked through the DOI registry, Google is interested in much more including dissertations, technical reports and institutional repository items. This raises some interesting intellectual property rights issues. For example, Google Scholar may display links to both a published journal article that is accessible only through a subscription and a freely available copy stored in the author's institution's institutional repository. Will this ease of accessing alternate versions result in publishers losing revenue? Google is also using its propriety PageRanking technology, which is a closely-guarded secret. This lack of transparency in how citations are prioritized is troubling.

Google Scholar is also working with libraries to make Google Scholar work for their users. Libraries with OpenURL linkresolvers can sign up in the Google Scholar access registry. This registry will enable "local library" links to display citations for content that the library subscribes to and makes accessible through their linkresolver. However, Google Scholar is asking these libraries to also supply Google with their holdings information as well so the benefit comes with a cost.

Not all the publishers are happy with Google's methods. While Amy Brand characterized CrossRef's modus operandi as careful, Google was linked to Godzilla on a rampage. Google is increasingly being viewed as a behemoth that does not hesitate to move quickly into new services. They do not always ask for permission when mining for data to index. They are also well-known for focusing on advertising to generate revenue. Some publishers would like to limit Google's use of the mined data, would like to block Google from crawling their sites, and to have Google remove data at their request. Google, however, drives a lot of traffic to publisher sites. So while publishers may frown at Google's lack of true collaboration, they are slow to take any real action at this point.

Serials Industry Truth or Dare

Dena Schoen, Regional Manager-North America, Otto Harrassowitz;
Julia Gammon, Head, Acquisitions Department., University of Akron;
Zac Rolnik, Publisher, Now--The Essence of Knowledge;
Bob Schatz, Director of New Business Development, Coutts Library Services
Reported by Virginia A. Rumph

This program was designed as a free ranging discussion among presenters representing a broad spectrum of the scholarly communications chain, and the audience was sparked by specific questions posed by members of the panel. **Schoen** began by asking the question: Most librarians say they want agents to survive and thrive, but if that is true why do they bypass vendors to order directly from publishers or aggregators? **Gammon** responded that consortia think they save money bypassing vendors. Individual librarians have no choice since the purchase is a consortia decision. She mentioned OHIOLINK as an example. Schoen commented that this consortia policy is very harmful to agents. However, librarians also bypass them and deal directly with publishers even in situations where a consortium is not involved. A member of the audience said that some vendors do not provide good service for electronic products, so librarians might feel forced to deal directly with publishers or aggregators. The audience conceded that this is an area of vendor service that is improving. If so, vendors can hope to receive more orders for electronic products in the future.

Gammon observed that librarians tend to treat vendors as friends rather than as businesses. A spirited discussion followed. An audience participant said librarians often do not have financial analysis expertise. They do not know what information to ask for or how to interpret it. Another participant mentioned that if service is satisfactory, no further investigation occurs. More that one person lamented that business skills are not taught in library school. The institution should be looking at the complete picture when choosing a vendor; financial health, service offered, vendor's database, EDI, etc. Schoen pointed out that subscription agents are very different from other vendors who interact with purchasing departments. These differences must be understood and taken into account. An audience member said that there is a need for the same sort of detailed analysis of vendor financial health that already exists for publishers. However, librarians are largely sheltered from business reality. **Schatz** said Acquisitions is not well taught in library school either, one result being that individuals come into these positions ill prepared to deal with the

financial scrutiny of vendors. In addition, as vendors are pinched financially, more and more either go out of business, merge, or get bought out. An audience member thought librarians usually take the financial health of their vendors on trust, but should monitor service performance, and switch vendors for poor service rather than negative financial information. Schoen also pointed out that librarians need to make every effort to resolve problems before taking the drastic step of switching vendors. There seemed to be wide consensus that librarians need more training in financial analysis.

Rolnik asked what metrics are used in the decision to cancel or pick up a subscription. Many in the audience mentioned cost per use, curriculum support, user requests, and indexing. Link resolver data should be used to flag requests from non-full text titles so full text access can be purchased. Faculty requests are an important factor in adding new titles. Interlibrary loan requests are also useful in deciding to add a subscription. Rolnik then wanted to know how a new publisher starts a title with no powerful faculty editors, or name recognition. The audience wanted to know how to reach index publishers to get new titles indexed. In conclusion, there needs to be more give and take among indexers, publishers and librarians. NASIG might have a role in this ongoing dialog, developing these problems as a conference presentation topic.

Schatz asked why librarians cut book dealers out of standing order purchases when dealers give better service than periodical vendors. Schoen mentioned that since profit margins are better for standing orders than for periodicals, it is in the periodical vendor's interest to promote consolidating those titles with the librarian. However, standing orders can be difficult for either to handle well since book dealers may have trouble with their periodicity, and periodical vendors with their irregularity. Gammon said library departmental structure may cause a division between periodical ordering and standing order ordering. Also, how titles were ordered in the past may determine the current situation. Moving standing orders from one

source to another is usually difficult, time-consuming, and expensive in the short term.

Rolnik asked if the game is over for small publishers. Now that large publishers have swallowed up STM journals, they are pursuing social sciences and humanities titles that are already established, and then drastically raising subscription prices. An audience participant said SPARC missed a chance to support small publishers, by deciding to compete directly with large publishers. To expand the publisher membership in NASIG, Rolnik urged active NASIG outreach to small publishers to join, be on conference panels, and get involved in any other way that seems appropriate. NASIG should more aggressively pursue its goal to be the major forum for information exchange between publishers, vendors, and librarians. Schatz mentioned that there are many conferences and other venues that small publishers must choose from to spend their limited time and funds. NASIG must make a convincing case that it has value for publishers, especially small publishers.

We Own It: Dealing with "Perpetual Access" in Big Deals

Andrew Waller, Serials Librarian, University of Calgary;
Gwen Bird, Head of Collections Management, Simon Fraser University Library
Reported by Amy Carlson

The rise of the "Big Deal", or large electronic journal packages, paralleled the increase in online resource availability as well as user interest. Now that some of the "Big Deals" are mainstay and no longer new to some libraries' collections, Electronic Resource Managers have become aware of the influx of titles added and subtracted from these large package deals. Although their contracts may have stipulated access in perpetuity in reality this may not be true. Print titles, in many cases, were cancelled due to the available electronic copy. Maintenance for these changes is both time consuming and elusive to track. **Gwen Bird** and **Andrew Waller** created a project to assess the maintenance of this "Big Deal" for the libraries in the Canadian Research Knowledge Network (CRKN).

For their project, Bird and Waller isolated six large packages: Academic Press, American Chemical Society (ACS), Institute of Physics (IOP), Royal Chemical Society, SpringerLink and ScienceDirect. The Canadian Research Knowledge Network, made up of 64 libraries, was formed upon the receipt of a $50 million grant to build Canadian research resources. Between 2001 and 2003 over seven licensing agreements were made with a perpetual access clause for the 64 libraries; additional, regional agreements were made in following years. The survey distributed to the 64 CRKN member libraries included a quantitative portion, holdings data and changes, and a qualitative portion, which asked them to make comments via email. Bird and Waller asked publishers to provide them with changes to their package deals over the period surveyed. Some publishers supported their survey; others could not provide lists of changes. In addition, some titles were no longer available from the original publishers.

The results of their survey showed that most libraries are not able to fully track and reflect the changes in the 'Big Deals'. The CRKN is collectively spending tens of millions for these resources; with interlibrary loan an added time and monetary cost. For titles bought, sold or transferred by publisher, less than 35% of the libraries, who responded, had pursued perpetual access, as stipulated in their contract. More than one library responded that they were unaware that CRKN had negotiated for perpetual access. Centralized efforts to maintain holdings and title information, strategies for publishing-industry wide notification, and stability in package deals would help the libraries.

Bird and Waller suggested further topics of investigation. Such investigations should include large versus small libraries, and the role of the commercial providers, such as Serials Solutions, SFX, and EBSCO. Librarians, service agents and publishers should work collaboratively to solve some of these issues. A large publisher going out of business, who agreed to provide perpetual access to individual articles, was discussed. These challenges have not yet been explored. However, use of electronic resources in general is high, and the library community must deal with the maintenance issue.

The group discussed who notifies them of changes in access and how they handle the changes. The discussion brought out differences in customer service philosophies. Other questions and comments were made concerning the role of the Electronic Resource Management Systems and how they may provide help, free

electronic access with print or bundled titles, and

tools such as A-Z lists.

Institutional Repositories
Carol Hixson, Head of Metadata and Digital Library Services, University of Oregon
Reported by Morag Boyd

Carol Hixson, Head of Metadata and Digital Library Services at the University of Oregon, delivered a strategy session "If We Build It, Will They Come (Eventually)?: Scholarly Communication and Institutional Repositories." She described the process that the University of Oregon used to plan and implement an institutional repository.

The presentation began with a description of the evolution of her department from a traditional cataloging department to its current functions. The department is now responsible for a wide variety of functions including traditional cataloging, digital library projects, and Scholars' Bank, the University of Oregon's (UO) institutional repository.

The functional changes of the library unit and Scholars' Bank were the result of several trends. Like most other libraries, they were facing changes in providing access to scholarly information, resulting in providing access to less of the available scholarly output than in the past.

Institutional repositories (IR), defined as "digital collections capturing and preserving the intellectual output of a single or multi-university community", were seen as one approach to handle these changes. SPARC (Scholarly Publishing and Academic Resources Coalition) advocates that Institutional Repositories serve to diversify publication, archive output, and increase visibility and prestige for the institution. Therefore, providing increased access and facilitating control for scholars over their own work. Although Hixson stressed that IRs are not a total solution, they can be part of new models of scholarly communication.

These arguments led the University of Oregon to investigate establishing an IR. In January 2003, a group of interested individuals from the library began by exploring the issues and gauging campus interest. This investigation led them to begin implementation of an IR by selecting software.

Software was evaluated under several criteria. Since resources of all kinds were scarce, they focused on IR software that would be easy to implement, inexpensive, Open Archives Initiative compliant, and proven in the library environment. DSpace, an open source solution with an active user community, was chosen for implementation.

In addition, they developed a "local context" for the implementation of DSpace. Policy development was important. Web pages were created to target specific issues and different audiences. Hixson felt that providing information targeted at specific audiences was beneficial in building support for Scholars' Bank. For example, faculty members are very interested in copyright, so Scholars' Bank includes a great deal of information about rights to self-archive and other copyright related concerns.

DSpace is designed around a "community" concept which shaped and complemented the approach to developing content for Scholars' Bank. The IR implementation group went to campus constituencies that they thought might be interested in the IR and offered them a community in Scholars' Bank. They worked with the communities to identify the kinds of items that might be deposited, any restrictions on public viewing, people whose work could be submitted, and who would actually make the submissions.

In May 2003 Scholars' Bank was launched for trial. The work of submitting a document and creating metadata was an obstacle. The library offered to actually submit documents to Scholars' Bank on behalf of the authors. Overall, 98% of all submissions have been done by library staff.

A second issue was the requirement for authors to submit a license agreement. Outreach efforts have educated authors about the open terms of the Scholars' Bank license as well as the rights of authors under other publisher's agreements.

In the last 6 months activity has dramatically increased, with a 255% increase in deposits with a total of 780 items in Scholars' Bank. This upward trend may have resulted from an expansion of the mission of Scholars' Bank to include either scholarly work or items that support the scholarly mission of the university. Due to this mission, Scholars' Bank is now open to virtually all faculty, staff, or student work that is sponsored by a community.

Use of Scholars' Bank comes from several sources. DSpace is searchable and offers notification of new submissions at whatever level the user selects. However, the most common discovery tool is Google.

Having described the basic set-up, Hixson turned to the treatment of serials. Including serials in Scholars' Bank required some creative approaches. They actively pursued this content, meeting with editors and offering to do the work to deposit the serials. Several newsletter and other serial publications are now in Scholars' Bank and are actively added as new issues are published.

A second major challenge is ensuring a logical and useful display within Scholars' Bank. Creators of the content are often not using consistent enumeration or chronology. Compounding this, DSpace was not designed to present entire issues or runs of serials. The solution was to provide metadata for each issue of the serial. Because DSpace orders result sets by ASCII sort, naming of the issues is crucial to ensure and appropriate display. They have adopted a library supplied number system such as 2005:1 to solve this problem.

They are still experimenting with the process for capturing serials. A major question is the level of detail that should be included in the metadata for each issue. In addition, these serials are being added to the library catalog with links to both the native and Scholars' Bank versions of the publications. Because the metadata has to be adapted for Scholars' Bank they cannot rely on it as a source of AACR2 cataloging.

Student works are increasing in Scholars' Bank. There are several class archives for courses taught in the University of Oregon's honors' college. The students take depositing in the IR very seriously which results in higher quality work. In addition, Library Research Awards recognize outstanding student works which are then deposited in IR. Because students are the next generation of scholars, there is a great deal of hope that by involving them in an IR now will engage them in new paradigms of scholarly communication.

Currently the library does virtually all the work for submitting material to Scholars' Bank. They know that this model will not scale up well. The library staff is now working with the students and individual faculty members to self-deposit. They hope that self-depositing will increase as Scholars' Bank is adopted by more and more departments/communities.

The University of Oregon is examining several measures to determine the success of their trial IR. They have compared the number of deposited items to several other IRs. In all cases, the numbers are quite small, but they feel that have been successful in acquiring content. Although they have not changed scholarly communication, Scholars' Bank has led to discussions in departments throughout campus and the IR has provided access to grey literature and under-utilized campus publications.

Future plans are being established for Scholar's Bank. They will market Scholars' Bank, including advocating alignment with teaching by promoting student research, and encouraging self-submission. An advisory group will assist in the continued development of Scholars' Bank. The library also plans to develop searching guides to assist users and to contribute to the development of DSpace.

Following the presentation, an audience comprised primarily of representatives of academic libraries asked many questions. Several questions related to the recruiting content and the technical operations of Scholars Bank. Sustainability and discussion of the gap between the number of institutions planning and IR and the number in production were topics of lively discussion.

TACTICS SESSIONS

Using Customer Service Software to Manage Serials Online Access Issues

Carol Ann Borchert, Coordinator of Serials, University of South Florida
Reported by Robert J. Congleton

In this session, **Carol Ann Borchert** described how she used *RightNow,* a customer-based software, to manage problems with accessing online journals at the University of South Florida at Tampa. The software had been used by several other library departments to manage reference and technology issues. It replaced an inefficient email list Ms. Borchert had used to manage complaints about online journal access.

Features in *RightNow* enable patrons and staff to report a problem incident. The software also

enables staff to track the status of the incident during the problem-solving process. Incidents can be retrieved by subject, status, individual name, or incident reference number. In addition, the software can also produce a variety of statistical reports regarding the number and type of problem incidents. Ms. Borchert presented several statistical reports, covering areas such as staff effectiveness, view of incidents by category, and staff performance by incident. She identified several benefits of the software: incidents are no longer mixed in with other email; a transcript of each incident is retained; internal staff notes and responses to patrons

can be recorded; and a variety of statistical reports can be produced each month. She also mentioned several disadvantages to using the software: statistics are limited; it takes more time to resolve problems using software separate from the library's online system; and organization of the data retained is haphazard. Borchert concluded by offering general considerations for selecting software.

The main questions and comments offered by the audience concerned why vendors do not include similar features in the online systems they sell to libraries.

Metadata Management Design
Nathan Rupp, Metadata Librarian, Cornell University
Reported by Elizabeth Bogdanski

Metadata Management Design, presented by **Nathan Rupp**, Metadata Librarian at Cornell University, focused on the creation of a central repository at Cornell University for metadata tools. Digital library objects have bibliographic metadata. In addition, the collections of digitized texts also have metadata in MARC records which can be repurposed and converted to use in a digital library. Rupp stressed that this metadata does not need to be recreated for each project. It can be maintained in one place, such as a repository, and used for both MARC records and metadata.

Converting metadata can be done in two steps. First, mapping the elements in the MARC records to the metadata elements, and second transforming the data or programming for the digital library. Currently, there are national efforts to map metadata including mapping MARC to Dublin Core and MARC to MODS.

Cornell began working on mapping for the *Historical Math Monographs* digital project. The MARC records for the texts have dates in two

fields because both the print and digital texts are cataloged. The date needed to be mapped for the digital text then transformed into metadata for *Historical Math Monographs*.

To ease the transition from mapping metadata to transforming metadata IT can develop tools such as style sheets so staff can create and update metadata independently. Then these tools can be put into a centralized repository. Bringing together all of the tools held locally on individual desktops into a repository would make metadata management possible. Essentially, the repository would be metadata about metadata. The readily available tools would be searchable, increasing productivity and allowing researchers to pick the best tool for the job.

The metadata management system would bring together users and developers. Although this project would be big, bringing together many libraries, the effort will be extremely valuable because it would provide a context for what the libraries are doing and facilitate metadata resource sharing.

Beyond Article Linking: Using OpenURL in Creative Ways
Morag Boyd, Bibliographic Services Division Head, Illinois State University;
Sandy Roe, Serials Librarian, Illinois State University
Reported by Amy Carlson

OpenURL enables a library patron to go from citation to full-text resource in a matter of clicks. Shortening the research process, the OpenURL standard and article linking software available pulls together disparate sources of information almost seamlessly. However, what are the possibilities of applying this standard and software to more than linking citations to full-text articles? **Morag Boyd** and **Sandy Roe**

presented the OpenURL implementation project and applications conducted at Illinois State University to foster a discussion on creative possibilities.

The session opened with Boyd and Roe providing a brief explanation of the workings of the OpenURL. A handout distributed to the group provided additional information, including

definitions and descriptions of concepts employed throughout their presentation. The basic components of an OpenURL are: a base URL, a source id or the origin of a citation and the citation information, such as ISSN, journal title, book, article authors and page numbers. It is a standard for an "actionable" URL, or a connector between source (full-text resource) and target (indexing or abstracting resources). Boyd and Roe highlighted identification of appropriate copies; leading users to materials in fewer steps and centralizing coverage management as benefits of an OpenURL.

Illinois State University's Milner Library serves primarily an undergraduate population of about 20,000 students with 1.6 million volumes and 20,000 electronic or online resources. Their OpenURL implementation project was planned to begin in two phases. Phase I began in spring 2004 with the choice of linking software, SFX, training and a launch in March. Representatives from the library comprised the implementation team, with a smaller subset of the team working on customization. Although they activated article linking, the decision was made not to activate Interlibrary Loan. They incorporated "Find it" or the linking icon into the instruction course and materials, but had no other marketing for the service. Phase II began in summer 2004 with the implementation of the A-Z journal list, citation linker access and added ability to copy

and paste. They continued to troubleshoot, make changes and do outreach to the university community. Future plans of implementation include an upgrade in summer 2005; a consortial based server, web site redesign and marketing as well as activating the interlibrary loan capability. The hope is that future activities might include usability testing and systematic monitoring from across the library.

The presenters pointed out additional uses for the OpenURL standard and article linking software. Illinois State University used the software for usability testing of the catalog, for bibliographies, course syllabi, and reserves. Staff provided the faculty with citation linker and a training "movie" hoping that the faculty themselves would learn to create persistent links. They presented usage data from Phase I of the project and an informal survey given to the students. In development currently are databases of faculty publications and providing persistent links within local, digitized collections.

Boyd and Roe opened the discussion period with questions for the audience, such as how does OpenURL work with other institution's course management software and how to minimize user's difficulties in finding resources. The discussion centered on the choice to delay interlibrary loan, logistics of their implantation and challenges faced with the software.

Binding Journals in Tight Times: Mind the Budget

Lucy Duhon, Serials Librarian, Acquisitions, University of Toledo Libraries;
Jeanne Langedorfer, Coordinator of Serials, Bowling Green State University
Reported by Deberah England

Duhon began the presentation by polling attendees as to whether their libraries had experienced recent binding cuts. An estimated 30% responded in the affirmative. Duhon then addressed two issues currently affecting binding budgets, the switch from print to the electronic format and budget cuts.

Although intense rivals on the athletic field, the University of Toledo and Bowling Green State University's libraries have a history of collaboration. Both schools are similar in size and are located approximately 20 miles apart in northwestern Ohio. In 1998, the libraries entered into joint contracts with a periodicals subscription agency and a bindery vendor. By combining their contracts, both obtained lower service charges on periodicals and lower per piece cost for bound items.

Duhon reviewed Ohio's unique funding situation whereby public institutions of higher learning are projecting 10% budget cuts in the near future. These cuts impact OhioLINK-provided resources and when cut, the libraries must decide whether to cut or pick up the resources. In 1996, 178 e-journals and 18 databases were available via OhioLINK. In 2005 the totals have increased significantly to 6,100 e-journals and 132 databases. Locally, Bowling Green provides 1,752 e-journals, 33 databases, and more than 17,000 full-text aggregator-provided titles. Toledo's holdings are similar for databases with 33, less for aggregator-provided titles (12,000+), and more for e-journals at 2,315.

In the last ten years Toledo has cancelled journals approximately every two years. Although print journals received were declining, the binding budget remained the same until two years ago when a new Dean advised making

better use of expenditures. Consequently, Duhon was instructed to cut her binding budget by 90%. For fiscal year 2003-04, Toledo's binding budget was cut from $54,000 to $10,000 and currently is lined at $12,000. In the ten years prior to the radical budget cut, 9,000 volumes in all formats were bound yearly. After the cuts the library binds about 1/6th of what it previously bound. New monograph paperbacks are no longer bound. During fiscal year 2003-04 only 10 books were bound. Duhon reported that in the latest fiscal year, 833 journals volumes, 437 theses, and two to three books were bound.

In response to the radical budget cut Duhon compared the lists of titles available in OhioLINK's Electronic Journal Center, JSTOR and aggregator databases. Aggregator holdings were not easy to identify. After comparing holdings, Duhon identified six categories of titles to stop binding immediately:
• Perpetual online availability
• Limited retention
• Binding frequency
• In-house binding/storage alternatives
• Online-only subscription
• Consider cancellation

JSTOR titles were problematic due to embargo periods. To address this concern, notes regarding the embargo period were added to records while issues were either temp bound or shelved in boxes. A small number of titles were bound less frequently or bound with more issues per volume. Over 100 titles were converted from binding status to "stable online archive" while 457 titles were coded as "Do Not Bind." High theft titles, such as nursing journals, were identified for Thermabinding, with the caveat nothing older than five years would be Thermabound. Haworth titles were selected for a pilot as a test for the 1,100 titles identified to consider for pam or box binding. Finally, print subscriptions that could be converted to online subscriptions were cancelled and converted. By mid 2004, Toledo had 1,908 of their 2,421 print titles coded for binding with approximately 1,700 having no online access.

In retrospect, Duhon advised that instead of moving towards the middle as she had, one should "work out" and determine what is critical to bind and go from there. Tactics Duhon plans to utilize in the future are to continue converting existing print titles to online subscriptions, preference online subscriptions for new titles when possible and preference online packages to individual titles, periodically re-evaluate the

binding file and utilize limited retention or temporary holding measures when possible.

Langendorfer emphasized that Bowling Green has not faced the same budget cuts Toledo has. In recent years Bowling Green's binding line has been cut by $10,000 while the number of volumes bound has decreased from 8,000+ to almost 6,000 in the last two fiscal years. Collection-wise, Bowling Green has cut duplicate print titles with online stable environment counterparts in OhioLINK's Electronic Journal Center. Last year, low-use titles with less than six uses in five years were cut along with faculty-selected titles in order to meet the budget target. Bowling Green now binds 2,006 of their 2,450 current periodical subscriptions.

Currently at Bowling Green there is no pressure to reduce binding expenditures. However, if the library's budget declines, Langendorfer expects binding lines will be reduced. Langendorfer pointed out that the binding allocation was decreasing through cutting print titles. However, some binding procedures have changed. Instead of temp binding incomplete volumes, they are now bound incomplete.

In the near future Langendorfer plans to continue cutting standing orders. Other tactics that may be employed are canceling 123 print titles duplicated in the Electronic Journal Center, reference material if available online and unique titles if further budget cuts occur. Langendorfer stated that Bowling Green is heading more purposefully toward online resources and, if available, online and print preference will be for the online version. Additional tactics considered are purchasing shelf-ready (including pre-bound) monographs, discontinuing binding of JSTOR titles, and dropping the library's personal binding service.

Duhon wrapped up the presentation by summarizing the results from her binding survey of Ohio academic libraries. According to Duhon, over 60% reported to now have binding budgets under $10,000. Fifty percent rely on online archives and as a result use limited retention for print titles in the Electronic Journal Center. Twenty-eight percent use limited retention for titles with no permanent holdings while 43% of libraries reduced overall serial subscriptions. The majority of libraries reported they base decisions on several criteria: 70% based decisions on Electronic Journal Center coverage; 53% on aggregator coverage; and 50% on miscellaneous strategies. Half of the

respondents said they no longer bind popular, non-scholarly titles while over one-third of respondents no longer bind trade journals, gifts, and indexes and abstracts. Finally, one-third of Ohio academic libraries lost up to one position due to binding cuts.

Several questions followed Duhon and Langendorfer's presentation. One question explored was whether the libraries link and barcode single issues since this practice distorts counts. Neither library follows this practice. Duhon stated that Toledo keeps a card file of Thermabound titles. An attendee volunteered that their library details all holdings in multiple holding statements. Another person queried how the faculty was reacting to Toledo's

reduction in binding. Duhon commented the issues were piling up on the shelf now. Another question addressed the impact of binding cuts on workflows. Duhon reported she had one FTE working on binding prior to the cuts who is now binding half-time with the remaining 50% devoted to copy-cataloging. Langendorfer had one HTE added to binding. Additional questions posed were whether the binding cuts affected the cost per volume bound, and if the libraries bound theses. Langendorfer reported reductions have not affected the cost of binding. In August, all Bowling Green theses and dissertations will be electronic. Duhon said Toledo binds one copy but previously bound two.

Collaborative Checklist for E-Journal Access
Rocki Strader, Electronic Resources Manager, The Ohio State University Libraries;
Alison Roth, Regional Sales Manager of the Northeast, Swets Information Services;
Bob Boissy, Licensing Manager in the Library Relations Group, Springer
Reported by Julie Harwell

The session began with an introduction of the speakers by Dana Walker, Electronic Resources Librarian with The University of Georgia Libraries; the presenters were **Rocki Strader**, Electronic Resources Manager with The Ohio State University Libraries; **Alison Roth**, Regional Sales Manager of the Northeast, Academic Market, with Swets Information Services; and **Bob Boissy**, Licensing Manager in the Library Relations Group with Springer. A one-page, two-sided copy of the checklist was distributed for reference and discussion, and the presenters began the session with a PowerPoint presentation.

Representing a library's view, Strader lead the presentation with background information on the history of the collaboration and an emphasis on the ways that all parties involved with e-journals can work together. Strader initiated the project with the basic goal of providing access to materials needed by researchers and other users. She outlined the process as: initiating inquiry for selected titles; requesting pricing information or quotes/pricing information; negotiating the license; providing IP addresses; paying invoices; communicating problems; and collecting usage statistics. She noted that this process may work with publishers directly or through agents, individually or as part of a consortium.

Presenting a subscription agent's perspective, Roth began her portion of the presentation with a quote she had read on the SERIALST

discussion list (http://www.uvm.edu/~bmaclenn/serialst.html), namely, working with serials "is like nailing JELL-O® to a wall" and she joked that now in the e-world one needs to be careful not to get a shock. Roth noted that, in retrospect, print seems easier. She indicated that agents do well with administrative functions, pricing, reference numbers for e-journals, maintaining IP addresses of customers to provide to publishers, maintaining license essentials, and may be involved in package negotiation.

Boissy outlined the view of a publisher regarding their function (selecting, preparing and packaging content) and process (setting prices, offering license terms, providing invoices, providing access control, responding to access problems, and providing usage statistics). Most publishers are commercial in that they seek to make a profit. This is usually done by offering a variety of purchase options including pay-per-view, semi Open Access, full Open Access, and per rate subscriptions which include models of backfile access. Regardless of whether the publisher is commercial, all publishers seek a viable business model to sustain their publishing roles.

Roth and Boissy discussed current issues in the serials market. Over 50% of North American libraries receive both print and online journals; this is a very conservative estimate across all markets (academic, public, etc.). The extreme pressure on library budgets serves as a catalyst

for the market. It has driven key publishers to establish direct contact and build brand name recognition to decrease the likelihood of cancelled subscriptions. There is strong sentiment on all sides for the ongoing role of agents as intermediaries, but there is increasing pressure on agents' revenue. Byproducts of the pressure on all parties include new publishing models, brokering, licensing and electronic resource management systems. We are in a state of flux. Thus, there is no uniformity in business models, licensing terms, archival rights policies, etc.; much of this is peer-driven and yields jockeying which is not comfortable for any party.

Rocki began a review of the actual checklist which has four columns (Task, Library, Agent/Vendor and Publisher/Vendor) and thirteen rows (Pricing structure/business model; Availability; Quoting; LIcense negotiation; Invoicing; Access/claiming; Authorizing renewals; Cancellations; Internal communication; Troubleshooting; Usage statistics; Title Changes; Record keeping; Process improvement). Their biggest challenge was the consolidation of tasks. Thus a chart format is used instead of a classic checklist so each person's role and interaction for each task can be clearly reflected. A general discussion of each point within the checklist followed, and the session concluded with a question and answer segment. Some of the points discussed were: the need for publishers to set prices earlier; grace periods for renewals to compensate for license negotiation and actual signatures on the final license which sometimes have to go through state agencies; cancellations as a negotiating point in a license; a need to automate the activation process where as soon as the invoice is paid then the access is activated or simply activate access and "figure out the order later because it can be figured out later;" bibliographic information, including title changes should be documented on a journal's home page; amendment clauses need to be included in a license so minor title changes do not require a whole round of signatures again; the need for obtaining MARC records as soon as possible; with the emergence of A-to-Z lists, deciding who will be responsible for providing updates to these lists.

Issues in Scholarly Communication: Creating a Campus-wide dialog

Jennifer Duncan, Electronic Resources Librarian, Utah State University;
William Walsh, Head of Acquisitions, Georgia State University;
Tim Daniels, Digital Technologies Librarian, Georgia State University
Reported by Andrea Imre

The speakers in this tactics session described methods employed by teams of librarians at two universities, Utah State University and Georgia State University, in an effort to reach out to campus communities and inform them about current issues in scholarly communications and the growing serials crisis.

Jennifer Duncan began the presentation with a description of a departmental visit program now in its second year at Utah State University. A group of librarians with responsibilities in collection development and acquisitions visited academic departments to give brief presentations about the current state of the publishing industry and that of the scholarly communication system.

The need for such a program was evident at Utah State University because the relationship and cooperation between campus departments and the library had deteriorated after several years of journal cancellation projects. Faculty members on campus were uninformed about the library's financial situation and the causes of cancellations and had very little idea as to what the library had been doing and what campus faculty could do to resolve the crisis.

The two-year program included presentations and open forums in departmental faculty meetings and exhibits or "road shows" on several campus locations promoting the library. The slides presented at faculty meetings included graphs and charts with specific data on the following elements: rates of inflation for serials, library expenditures, library budgets (both nationwide and in Utah), cost histories of subject areas, and, finally, data on specific journals. The slides were intended to inform faculty that the issues their library was facing were not limited to Utah State University's library. At the presentations it was pointed out that libraries all over the country had been struggling with rising journal prices and shrinking budgets. Duncan noted that the presentations and the discussions at the departmental meetings seemed to clear up some of the misunderstandings on the part of the faculty who had the impression that the library does not know how to make good financial decisions.

The sessions provided a good opportunity to promote library activities aimed at improving the situation. The participation in consortial arrangements resulted in considerable savings for the library. In addition, the library's fundraising activities, the library's support of such alternative publishing venues as SPARC and PLOS, the departmental visiting program, and active lobbying of university administration for more financial support were all important in that they tried to minimize the negative effects of the serials' crisis. Faculty were encouraged to find out the pricing structure of the journals they edit, to consider carefully the editorial boards on which they serve, to publish in open access journals, and to persuade professional societies to launch journals that compete with high price journals.

In the first year librarians visited almost 50% of campus departments, while in the second year the visits rose to 75%. The program resulted in an informed, more supportive, and more cooperative campus faculty. Due to the program's success, the library's profile also increased, new funding opportunities were identified, and departmental relationships were strengthened.

William Walsh's presentation described the scholarly communication blog created at Georgia State University. He pointed out that many libraries in the United States have websites and blogs addressing scholarly communication issues. Walsh described blogging as being one more tool raising awareness. The 21 blogs at Georgia State incorporated into the current library site reach a wide audience on campus. The scholarly communication blog is maintained by librarians in technical services and the web development librarian. Georgia State's scholarly communication blog covers a wide range of topics and tries to balance the STM focus of the Open Access debate by including humanities-related topics as well. Walsh ended his presentation with quotes attesting to the fact that sharing knowledge via blogging is an excellent way of gaining subject expertise on a topic.

The third speaker was **Tim Daniels,** who provided an overview of the development of Georgia State's institutional repository. He highlighted the importance of an IR with the following:

- showcase and preserve scholarly output and historic documents
- allow faculty to self-archive post-prints, pre-prints, and extra showcase and preserve scholarly output materials
- support teaching and learning
- provide a stable environment for the preservation of born digital materials

Institutional repositories can include a variety of materials such as pre-prints, post-prints, working papers, datasets, supplementary materials, and learning objects. Daniels was responsible for implementing an IR at Georgia State. He took every opportunity to build internal and external networks by talking to faculty, administrators, and students to promote the developing IR. He focused on identifying potential users and their needs. Then he assessed the content the user community could deposit into the IR by considering what content was available, what could be easily acquired, and which of these would have the most impact. Daniels also focused on identifying individuals who were most interested in the project.

Daniels concluded the presentation by stating that any librarian and faculty on campus having an interest in scholarly communication issues could and should get involved in projects described in this tactics session. Liaisons could play an important role in informing their departments about current issues. Technical services librarians could start a blog such as the one run at Georgia State University. Catalogers could enrich metadata for items in institutional repositories, while campus faculty could start their own open access journals. At the very least, however, they need to be informed about the policies of the journals in which they publish and/or the editorial boards on which they serve.

Adding Value to the Catalog in an Open Access World

Anna Hood, Head, Serials and Electronic Resources, Kent State University
Reported by Cecilia Genereux

Anna Hood began this tactics session by providing background information on Kent State University Libraries and explaining why she decided to start a project to incorporate the Directory of Open Access Journals into the

library catalog, KentLINK. Kent State University Libraries, part of the 84-library OhioLink consortium, provides access to electronic journals solely through its catalog. It does not have an A-Z title list or an electronic serials

management system. Separate catalog records are maintained for print and online serials with one exception; access to online serials obtained as a result of print subscriptions is placed on print records. However, according to Hood, Kent State's collection of locally paid for e-serials is not very extensive. The majority of the online serials are obtained through OhioLink, which also provides catalog records for the titles.

With a strong commitment to provide access to online journals through the catalog, Hood was looking for ways to increase the relevancy and currency of the catalog. With that in mind and armed with LibQUAL+ survey results indicating that students wanted more access to electronic content, Hood began her project to add the Directory of Open Access Journals (DOAJ) to KentLINK in 2004. By adding the DOAJ titles to the catalog, Hood hoped to provide access to a greater number of electronic serials with no impact on collection development budgets and support the open access model.

During the initial phase of the project, Hood obtained title and ISSN information from the DOAJ website and downloaded the data into a spreadsheet. After the initial title list was obtained, Hood began to add new titles on a monthly basis. Armed with the title and ISSN, Hood set up macros to automate searching for copy cataloging records in OCLC. If records were found, they were identified and evaluated. Constant data was applied to the records in Connexion and imported to KentLINK. The constant data set for the project includes a 006, 007, and a 730 for DOAJ. An 856 subfield z generic connection note and a subfield 3 with a generic accessibility note indicating that availability is subject to change.

Once the records were imported, local edits were made to the records. As part of her cataloging procedures, Hood verifies enumeration in the bibliographic record and adds Library of Congress subject headings when needed. She validates links and selects PURLs for use in the catalog whenever available. Lastly, Hood attaches an "opens" order to the bibliographic record as a means of providing the staff with information on how access was obtained.

After the initial load of titles, Hood began adding new DOAJ titles monthly. By June 2004, 971 of 1110 DOAJ titles were added to KentLINK, representing 87 percent of the available DOAJ titles. Almost a year later, 1386 of 1543 titles, or

90 percent of the DOAJ titles, were in the catalog.

Next, Hood described the quantity and quality of copy cataloging records found in OCLC for the DOAJ titles. She defined copy cataloging as records that needed some editing. Original cataloging was defined as no available copy and records needing extensive editing. In June of 2004, Hood found OCLC copy cataloging records for 88 percent of the DOAJ titles. For titles added between July 2004 and May 2005, the percentage dropped slightly to 84 percent. Hood reported that the most frequently seen cataloging errors in the OCLC records were missing or incorrectly coded 006 and 007 fields. In addition, the 008 Form of Original left uncoded, dates incorrectly coded, the inclusion of field 300, and missed title changes or title variations between the HTML and PDF versions.

Hood went on to outline the three methods she uses to maintain DOAJ URLs in KentLINK. The first method is by selecting PURLs for use whenever they are available since PURLs eliminate link maintenance at the local level. The second method of maintenance is through user reports of access problems. Not willing to rely solely on user feedback, Hood also has a system-generated 856 error report run every three to four months. Using field 730, applied as part of the constant data, the system identifies the DOAJ titles and tests the links in the records. A report is generated of all the returned status messages of HTTP/1.1 404 Not Found, HTTP/1.1 400 Bad Request, and Unable to access server.

Hood ended the formal part of her presentation by mentioning some of the challenges faced during the past two years and what she would like to do in the future. Some of the challenges that Hood faces is the inability to keep up with new titles due to staff reorganization, the inability to identify titles dropped from the DOAJ collection, and user expectations. Hood, with the help of one student worker, has been the only library staff person cataloging the DOAJ titles. A recent reorganization left Hood with less time to devote to this project, making it difficult to keep up with the cataloging of new DOAJ titles. She is hoping additional macros and scripting will streamline some of the processes, enabling her to keep up with new titles while spending less time on the project. Hood reported that access to individual titles can be unpredictable and that there is no way of knowing when a title is dropped from the DOAJ site. This can pose a problem with catalog

maintenance and user satisfaction. Another area of user dissatisfaction stems from unrealistic expectations that all full-text online journals are in English.

Hood spent some time at the end of the tactics session in dialog with the audience, asking if other libraries were providing access to open access serials and how they were doing it. Following the discussion, Hood answered questions from the audience and provided links to additional sources of open access titles.

Challenges of Off-Site Library Storage Facilities: Cataloging, Access and Management of Off-Site Serials

Sarah Corvene, Serial Cataloger, Harvard College Library Technical Services;
Zoe Stewart-Marshall, Database Enrichment Librarian, Cornell University;
Susan Currie, Associate Director of Public Services, Binghamton University
Reported by Linh Chang

The presenters led an informal discussion on the use of offsite storage facilities for collections as a way to address the issue no space for materials in core campus facilities. They shared their experiences on issues raised by offsite storage for active serials as well as inactive subscriptions and the challenges of planning that go into a large-scale move. Among the topics that were included in the presentation were material selection and record management, facility design, projects' planning, community consensus-building and managing the movement of large amounts of material.

Susan Currie opened the presentation with an overview of the challenges faced by Cornell University Library in planning for its offsite storage facility. Currie explained that planning for an offsite storage facility as a solution to the current and future lack of space in libraries on the central campus took over a decade. Cornell modeled its remote storage facility after Harvard's Depository Library, a state-of-the-art, high-density offsite storage building. The decision to emulate Harvard's design was made because it was felt it would provide maximum shelving efficiency, fully computerized access, inventory control, and an excellent climate controlled environment for long term storage of paper and film.

Currie said that after the initial design and planning of the facility, the next phase was to launch a public relations campaign. This was necessary to communicate with library users and the broader research community about the selection criteria used for those materials going to the new facility and what the moving process would entail. Currie emphasized the importance of keeping everyone in the loop to ease the emotional component that the faculty and graduate students have with the collection. Another important area that the library administration also looked at was how to keep things simple and logical.

The primary criterion that Cornell used to select materials to be stored offsite was to identify low use materials. In addition, fragile materials needing preservation or conservation work, materials requiring higher security, and especially high cost items, were also considered. The selection committee also determined that duplicates would not remain on campus and that weeding should be done as part of the process. Other materials considered for transfer included serials that had ceased publication or that were no longer being received, long runs of serials, and low use microfiche/microfilm sets. Offsite storage for foreign language material was also recommended and materials in subject areas not used for current teaching or research were also on the list for possible transfer.

The transfer of monographs to offsite storage worked well for Cornell in that record management was fairly straightforward. The disadvantage with monographs was the labor-intensive involvement in the selection and moving process. Transferring serials to offsite storage presented an entirely different set of challenges. A long serial run can free up a large amount of space in a relatively short time. However, if a serial title is requested multiple times from the offsite facility, a selector or faculty member may decide to transfer it back to campus permanently. Transferring partial runs of a serial set to the offsite facility has a whole array of problems in record management for holdings. How should the MARC holdings be displayed in the online public record?

The question was raised about how often materials were returned permanently to the main campus because of high demand. Currie replied that it happened more than a few times in the

beginning but the number of such incidents has gone down dramatically as users find the convenience of having the materials delivered to campus for pickup or having the items ready for them to use in the new reading room.

Currie concluded her presentation with slides of the offsite storage facility at Binghamton University Libraries which she oversaw. The project was similar to Cornell's but on a smaller scale. Her advice for anyone who is managing an offsite storage project is to have a clear goal and to keep the community informed. She expressed her overall experience at Cornell and Binghamton as being both positive and exhilarating. .

Sarah Corvene's presentation centered on a discussion of record management for serials housed offsite. In 1990, Harvard transferred only monographs to its offsite facility and serials were off limits due to strong resistance from the faculty. The transferring of serials to offsite storage did not begin until 1993 when Harvard participated in the JSTOR project and Project Muse.

Corvene reiterated many of the same challenges and advantages with the Harvard facility that Currie had discussed in her talk about the Cornell and SUNY facilities. Moving a large set of dead or ceased serials worked flawlessly and efficiently. The MARC holdings record becomes problematic when a partial run of an active serial set is stored offsite. A separate MARC holdings policy was needed to address the split holdings conundrum. Should a separate holdings record be created for each location or should one holdings record showing the summary holdings be created with reliance on item records for more detailed holdings? Other holdings' implications included what level of holdings to use for materials being sent to remote storage that are incomplete. Harvard's holdings' policy for currently received serials is to use level-4 holdings. Would the holdings' record need to be redone (and this can be labor intensive) or can one solely rely on item records? Furthermore, what impact would all of these have on current periodicals?

Apart from the holdings' issues, cataloging serials to be stored offsite also has its own challenges. Harvard provides CONSER level cataloging for serials. Since all transferred materials require a barcode that must be attached to each item that links to the catalog record, a decision needed to be made as to whether the CONSER level of cataloging is appropriate for materials held offsite. Other cataloging issues include making decisions on "deferred" cataloging for backlog materials. This simply means sending materials to the remote storage facility without providing a fully cataloged record for them. Corvene ended her presentation by indicating that there are still many unanswered questions and many decisions that need to be revisited or readjusted as the process continues to evolve even though Harvard had opened its first storage module in 1986.

Zoe Stewart's presentation focused on Cornell's second big move of materials to its offsite storage facility. This second shift of materials to offsite storage was necessary to accommodate the need for more space in the central campus libraries. The goal of this move was to concentrate more on moving entire runs of serials. The advantage of doing so was that it would free up a larger amount of space in a shorter time. Moving a split run of serials was not desirable because it can be labor intensive due to the treatment of separate holdings for separate locations and time consuming due to continuous updates of the holdings. Other selected materials to be transferred were non-print materials such as microfilm and microfiche sets. Also on the selection list to move to offsite was the "medium" rare materials with publication dates before 1851. Reaching a consensus between the faculty community and the library administration concerning what to send to the storage facility continued to be a big challenge. Aside from the delivery services, the offsite facility also offers electronic document delivery service for patrons such as scanning, printing, and faxing.

The Big E-Package Deals – Smoothing the Way through Subscription Agents
Gary Ives, Assistant Director of Acquisitions and Coordinator of Electronic Resources, Texas A&M University Libraries;
Tina Feick, Vice-President North American Customer Service, Swets Information Services
Reported by Sarah Sutton

Gary Ives and **Tina Feick** presented a well-attended and informative tactics session in which they addressed the utilization of

subscription agents' services to manage big e-package deals. Ives presented the experiences of the Texas A&M University System Libraries

as a case study and Feick described the development of the big e-package deals in general and the big e-package deals' management services that SWETS and other subscription agents offer. Both presenters described the advantages to consortia, individual libraries and publishers that derive from allowing a subscription agent to manage big e-package deals.

To begin the session, Ives described the Texas A&M University System Libraries' experience with big e-package deals. In negotiating big e-deals, Ives represents a variety of institutions which vary widely in size, scope and mission. At one end of the continuum of institutions he represents is Texas A&M University in College Station, TX with an enrollment of more than 40,000, in the middle of the continuum are eight smaller institutions that vary in enrollments from just over 1,000 to just over 8,000, and at the opposite end of the continuum are several smaller state agencies and Texas A&M University branches.

Most of the entities Ives represents operate independently. They use a variety of automation services and systems although most of them use the Voyager ILS, Ex Libris's link resolver (SFX) and federated search platform (Metalib). The subscription agent with whom the Texas A&M University System Libraries collaborates is EBSCO Subscription Services.

Ives highlighted the publisher licenses he has negotiated on behalf of the Texas A&M University System Libraries including Dekker, Elsevier/Science Direct, Kluwer, Springer, Taylor & Francis, and Wiley. In some cases, but not all, license agreements are negotiated through larger consortia, for example, the Great Western Library Alliance (GWLA) and in some cases they are negotiated directly with the publisher. In all cases the contracts are system wide and are managed by EBSCO.

An important benefit of working with a subscription agent, for the Texas A&M System Libraries, is pre-existing, accurate records of each library's holdings which facilitates both initial contract negotiation and annual renewal. In negotiating a contract with a publisher, Ives noted that often a currently held subscription is the basis of a system wide contract. On the scale that these contracts are negotiated, it is often the case that publisher title lists do not accurately reflect a library's subscriptions. In his experience, Ives said, it is the subscription agent who most often has the most authoritative,

complete, and accurate record of each participating library's holdings. This allows the subscription agent to provide prompt, complete, accurate invoices to each individual institution. Subscription agents provide a "single workflow for subscription management" by providing services like "on demand subscription management reports and collection assessment reports", tasks that would be impossible for the Texas A&M University System Libraries to handle on their own. These services lower resource expenditures on journal and e-journal management at the system level as well as at each individual institution.

Ives' presentation prompted several audience questions related to license management. In answer to one question, Ives reported that he currently manages and tracks Texas A&M University System Libraries system-wide licenses on paper rather than through the use of an electronic resource management (ERM) system. In answer to another question from the audience, Ives said that they would be disinclined to turn over license negotiation to their subscription agent because they did not feel that the subscription agent could represent the Texas A&M University System Libraries' unique situation as well as themselves.

During the second half of the program, Feick presented the benefits for subscription agents of managing an institution's big e-deals. She began by presenting a broad background of the development of the subscription agent's role in e-journals subscription management. She described how subscription agents built upon their role as a communication link between publishers, consortia and libraries and their existing function in print journal subscription management by extending them to e-packages. This enables them to provide individual libraries within a consortium with services that consortia often do not have the resources to provide, for example, accurate title lists, electronic data interchange (EDI) invoices, management and financial reports, consolidated payments, and eliminating the need for the library to create new vendors and purchase orders.

Feick described a pilot project SWETS is working on in partnership with several large university libraries and several publishers. Services in development in conjunction with this project include planning and consultancy on publisher products, license negotiation on behalf of the library, budget administration, and provision of access to e-journal packages. In addition, they are exploring the feasibility of

providing services like continuous access verification, e-resource data elements for ERM, and table of contents services.

To conclude her part of the presentation, Feick looked to the future, expressing her dream of establishing clear, consistent communication channels through which subscription agents, publishers, and libraries could achieve seamless ordering of e-resources, uninterrupted access to those resources, and exchange of e-resource management information through EDI.

An audience member asked Feick if a subscription agent might also have a role in troubleshooting e-resource access. She answered enthusiastically in the affirmative but added that the level of troubleshooting an agent

would be able to provide would depend on the publisher. Another audience member asked how a subscription agent might assist a library that operated under state laws that prohibited them from using a single vendor for all of their subscriptions. Feick responded that one way that this could be accomplished might be by organizing e-subscriptions through a variety of publishers.

Overall, the session was interesting and informative. Ives and Feick presented an excellent overview and analysis of their topic and provided the audience with a number of excellent solutions to the challenge of subscription management for big e-package deals.

Subscription Cancellation Projects: How to Quiet Some of the Roar

Bea Caraway, Head of Technical Services, Trinity University;
Clint Chamberlain, Electronic Access and Serials Librarian, Trinity University
Reported by Susan Schleper

As participants entered the room, they were met with a musical prelude which included "Gamblin' Jack" performed by Jelly Roll Morton; "Brother Can You Spare a Dime?" performed by the Ragtime Millionaires; "M-O-N-E-Y" performed by Lyle Lovett; and "You Can't Always Get What You Want" performed by the Rolling Stones. These tunes were chosen to reflect the tight budgetary times faced by many libraries. The music had a positive effect in that it set an informal tone to the session that was encouraged by **Bea Caraway** when she invited participants to ask questions and interject their own experiences and possible advice.

Bea Caraway began the session with a letter that she found as she was cleaning out old paper files. The letter indicated that, yet again, the library was approaching the faculty to ask for their help with a serials' cancellation project. The library was undertaking this project due to tight budgets and serials' prices that were spiraling out of control. The letter had been written in 1976, thus illustrating that the publishing crisis has been going on for quite some time. Since cancellation projects seem to be the norm rather than the exception, finding a myriad of ways to evaluate serials' titles can be helpful when presenting the faculty with the prospect of reviewing the serials' collection. Bea Caraway and **Clinton Chamberlain** proposed that another metric which should be investigated is how the relative strength of the US dollar influences foreign serials' titles that are, essentially, imported goods. In other words,

does the weakening US dollar affect foreign journal prices and, if so, would this information make a difference to faculty members who were making suggestions about which titles to target?

Letters were sent to the campus community in the spring to inform faculty that a serials' review was being planned for the following fall and that one of the considerations would be a price analysis of those titles published outside the United States. Projections were made, based on a formula, about how much each journal title's subscription price would increase. Basically, it was calculated that any imported journal would see a 14% increase based on a sum of 8% for the basic inflation rate of journals + 6% for the increase due to the exchange rate. To find the rate of inflation for a particular department, a percentage represented by foreign journals was multiplied by 14% and then added to the product of the percentage represented by domestic journals multiplied by 8%. The example was given for subscriptions in the religion collection. The religion collection had 38.5% of its titles tied up in foreign publishers so - the inflation rate for the religion collection was calculated as follows:

(38.5% [foreign titles] x 14 [foreign inflation rate]) + (61.5% [U.S.] x 8 [U.S. inflation rate])

(5.39%) + (4.92%) = 10.31%

Overall, the religion collection of journals should have seen a 10.31% increase due to foreign and domestic price inflation.

Based on these calculations, a specific dollar amount was presented to each department, by the librarian/liaison, which the department would need to cut. Clinton Chamberlain referred to the memos that were sent out to inform faculty members about the upcoming serials review. Specific information about each title was given which included price over time, % of change in price over the same period and the title's country of origin. In addition, specific suggestions were made to the faculty to help them make their decisions in order to meet the targeted dollar amount. These suggestions included dropping titles that had been added to Project Muse, converting titles to electronic only and/or dropping titles available through an aggregator. Each suggestion was followed by further information and the pros and cons to each action. It was further noted, in the memo to faculty, that country of publication had a big impact on subscriptions because they saw an extra 6% increase in price as compared to domestic subscriptions.

Surprisingly, it was found that this calculation had overestimated, by quite a lot, the amount of inflationary increase for foreign journal titles. For example, the Classics department was given a target amount of $461.00 to cut based on the calculation of inflation which was discussed above. Ultimately, it was discovered that the amount to cut was overestimated by more than $300.00. It was not clear why this happened even though the numbers were re-examined and it was also noted that there was a mix of over and under estimations. On average, there had been a $13.00 per title over estimation of inflation for the periodical titles at Trinity University. Another surprising finding was that when faculty was asked about the inflation information they said it made little difference. For them, country of origin did not affect their decisions on what to target for cuts.

Both Caraway and Chamberlain admitted that even though the focus on foreign journal titles as opposed to domestic journal titles hadn't made much difference, they learned valuable lessons as they interfaced with faculty. Department chairs and faculty were eager to share their views on a variety of library issues which were then reported to the library liaisons.

The presenters shared tips on what to incorporate into meetings with department chairpersons. These meetings began to be affectionately called "Chat with Chairs". A few of the tips shared were that the information for a cancellation project should be given well in advance of the deadline for cancellations. This gives faculty time to communicate interdepartmentally to make considered decisions. Caraway and Chamberlain found that new faces seemed to make the material fresh and more relevant and advised sending different people to speak with faculty other than the assigned library liaison. Additionally, the presenters found that the faculty had ideas about what information should be included in a serials' review project to make their decision-making easier. This information would be included in subsequent serials' review projects. Caraway and Chamberlain also learned that some faculty were not aware of important and convenient services provided by the library, for example, electronic delivery of interlibrary loan requests. This sharing of information also included how library instruction would be designed and delivered. Overall, Caraway and Chamberlain felt that they learned a lot from their "Chat with Chairs" and that this information would help them to better serve the faculty and students.

Examining Workflows and Redefining Roles:
Auburn University and The College of New Jersey
Jia Mi, Electronic Resources/Serials Librarian, The College of New Jersey;
Paula Sullenger, Serial Acquisitions Librarian, Auburn University
Reported by Gail Julian

Jia Mi discussed her position as Electronic Resources/Serials Librarian at the College of New Jersey from both a technical processing and a public access perspective. The College of New Jersey is a mid-sized institution with an FTE of 6147 with a focus on undergraduate education. The library uses Serials Solutions and EBSCO's EJS service. Jia's position is in public services; her duties include working the reference desk and doing bibliographic instruction. She prepares and monitors the budget for electronic resources, performs license negotiation, and troubleshoots access problems. Jia described her responsibilities in terms of centralized, collaborative, and distributed processes. The centralized

processes include monitoring the budget, ordering, license negotiation, payment, and working with consortia. Jia feels that this centralization results in the "speedy delivery of content."

Other processes are described as collaborative. These collaborative processes include working with subject specialists on selection, review, and cancellation; working with the web master on presentation; coordinating with collection development on budget issues; and working with systems on proxy server issues. The College of New Jersey Library follows a written Electronic Resources Collection Development Policy. Other processes are considered to be distributed. These distributed processes include generating usage statistics, using available Serials Solutions and vendor reports to track changes, and using Serials Solutions' overlap analysis report to evaluate collections. Jia emphasized the importance of teamwork, using vendors and agents when possible, establishing policies, and streamlining workflow.

Paula Sullenger led an informal discussion of an ongoing review of acquisitions' workflows at Auburn University. The goals of the review were to streamline existing workflows, determine appropriate future needs for electronic resources' management, and determine future staffing needs. Auburn is a land grant university with approximately 24,000 students. The Library has 2 branches with all technical services functions being centralized. Acquisitions has a staff of 18, uses students for periodical check-in, and uses Endeavor Voyager as their ILS. Paula and the Acquisitions department head met with

each staff member to discuss procedures, determine staff workloads, and to see what problems staff were encountering. Based upon these meetings, it was determined that "no major workflow adjustments" were needed. Some problems emphasized by staff were addressed. In addition, they met with other units with whom they interact regularly. For example, e-journal maintenance is performed in Cataloging so discussions were held with the cataloging e-resources team, and it was determined that no changes would be made to workflow in that area.

Three to four retirements are anticipated within the next five years in Acquisitions, and staffing needs related to electronic resources are expanding. Monographic requests and receipts have decreased, and a cancellation project a few years back has resulted in a 20% reduction in continuations. Auburn has begun the process of moving from print to electronic for journals beginning with Elsevier's ScienceDirect in 2005. With 2006, they plan to move titles from major publishers such as Wiley, Springer, Blackwell, Sage, Cambridge, and OUP to online only as well. These changes should result in savings in staff time for claiming and binding. Check-in will continue to be performed by students. An investigation of their remaining print titles indicated that no online was available or that the cost of online was significantly more than print. So it is anticipated that print journals will plateau and will not continue to drop. Paula anticipates that all retiring staff need not be replaced, but upon hiring a new Dean, unanticipated changes may occur.

AACR3 IS Coming – What is It?
Paul J. Weiss, Head, Monographs Cataloging Division, University of California, San Diego
Reported by Julie Kane

Paul Weiss started off the session with the revelation that AACR3 is actually *not* coming. While there is a work in progress that will replace the current AACR2, the working title of this document is now Resource Description and Access, or RDA. The goal of the developers is to create a new work entirely rather than view it as a new edition of AACR2, thus reflecting a shift in the approach to cataloging rules, incorporating FRBR, FRAR, and FRSAR. This session gave an overview of the history and progress to date of the Joint Steering Committee for Revision of the Anglo-American Cataloging Rules in the creation of a new edition of AACR, or RDA.

Weiss proceeded to cover the history of documents and conferences leading up to this revision. These included: the study, development and final publication in 1998 of the Functional Requirements for Bibliographic Records (FRBR), the International Conference on the Principles & Future Development of AACR (a.k.a. the Toronto Conference) in 1997, and the ongoing worldwide series of International Meetings of Experts for an International Cataloguing Code (IME-ICC).

A strategic plan for AACR was developed in 2002 and revised in 2004 by the Joint Steering Committee (JSC) and endorsed by the Committee of Principals (COP). The contents of

the plan include a statement of purpose, a vision for the future development of AACR, the strengths of AACR, the goals for 2004-2009, and strategies for achieving the goals. It is available online at: http://www.collectionscanada.ca/jsc/stratplan.html

Much of the future outlook involves a shift away from a card-catalog-based practice of description and access towards concepts available in an online environment. This will include changes in traditional terminology such as "main entry" and "added entry" and the inclusion of concepts and group 1 entity terminology from FRBR. Compatibility with other methods of description and access, introduction of the concept of authority control, and ease of use and interpretation are all emphasized in the new developments. RDA intends to produce a shift in concentration from the creation of catalog *records* to the creation of a *catalog* as a whole. The content will be built on AACR2, and records constructed from the new edition will be AACR2-compatible. Another change in direction will be an emphasis on an online product of RDA. Thus, making RDA open to greater possibilities of functionality, with the layout and formatting of instructions intended to be more "cataloger-friendly". Access issues will be emphasized throughout RDA, including sections on description, while levels of description, access, and authority control will be linked to user tasks.

Weiss outlined the JSC's objectives and principles for the rules:

Objectives:
- Comprehensiveness
- Consistency
- Clarity
- Rationality
- Currency
- Compatibility with other standards
- Adaptability for various user communities
- Ease and efficiency of use
- Format independence

Principles:
- Generalization
- Specificity
- Non-redundancy
- Consistency with FRBR concepts and terms
- Consistent and efficient reference structure

The structure of RDA will shift from the traditional layout of AACR2 to address these objectives and principles and to aid in the intended use of RDA. The intention will be to always apply the general rules first; special rules will only be applied when directed to do so by the general rules. References will be made in this direction *only* – from general rules to special rules, and not vice versa. This change in usage is intended to promote consistency across all types of records and to facilitate efficiency for catalogers.

The possible structure of chapter 1 includes changes that would bring all aspects of a data element into one area – for example, the title proper, parallel title, other title information, variant title, key title, devised title, and notes pertaining to titles would be brought together. This centralized organization is more in line with FRBR; organized first by user tasks, then by attributes of the work, expression, manifestation and item to identify the resource and to describe the technical characteristics and content. For each data element, the RDA rules would bring together the purpose, the source of information, how to record the information, and suggestions on whether to include it as an access point, either controlled or uncontrolled. This structure essentially pulls together pieces of information about each data element that are currently scattered throughout various areas of AACR2 and organizing them for ease of use and description.

A brief outline of the proposed structure of RDA is provided here (each chapter will still be arranged by ISBD area and element):

▶ Introductions
▶ Part I. Description
  • Introduction to Part I
  • Section A. General Rules
    ○ A1. General Rules for Description
    ○ A2. Resources Issued in Successive Parts
      ▪ (serials, successively issued multipart monographs, reprints of these)
    ○ A3. Integrating Resources
  • Section B. Supplementary rules applicable to specific types of content
    ○ B1. Text
    ○ B2. Music[al notation]
    ○ B3. Cartographic Resources
    ○ B4. Graphics
    ○ B5. Three-Dimensional Resources
    ○ B6. Sound
    ○ B7. Moving Images
  • Section C. Supplementary rules applicable to specific types of media
    ○ C1. Print and Graphic Media
    ○ C2. Micrographic Media
    ○ C3. Tactile Media
    ○ C4. Three-Dimensional Media

o C5. Audio Media
o C6. Projected Graphic, Film, and Video Media
o C7. Digital Media
►Part II. Relationships
►Part III. Authority Control
►Appendices

The timeline issued in the session outlines dates for development of all three parts; the completion and review of the draft of Part I is scheduled for October 2005-April 2006; part II, May 2006-September 2006; part III, October 2006-April 2007; General Introduction, Appendices, and Glossary, May 2007-September 2007, with a final publication date set for 2008. The closing caveat: any of this is subject to change!

Tracking Usage of E-Government Publications
Sue Kendall, Reference Librarian and Government Publications Coordinator, San Jose State University;
Celia Bakke, Head of Technical Services, San Jose State University
Reported by Sue-Ellen Johnson

This interesting presentation was given by **Sue Kendall**, Reference Librarian and Government Publications Coordinator and **Celia Bakke**, Head of Technical Services, both from San Jose State University.

San Jose State Library is a federal depository library. With the migration from print to online format for federal publications, the traditional ways of tracking usage (circulation records, shelving counts and patron surveys) were no longer applicable. Understanding the importance of acquiring Government Document usage data, Sue became very excited when she heard Chris Brown from the University of Denver speak about the program he had developed to generate detailed statistics on the use of electronic government documents through their catalog. A ColdFusion database tracks the click-throughs and an Access database is used to enhance the data.

Back at San Jose State, Sue and Celia assembled a team, including a Database Analyst and a Programmer. They would take Chris' idea a step further by creating a batch processing program that required less manual intervention. The resulting report retrieves groups and counts the following data: count, bibNum, suDoc #, class and title.

It took about 2 weeks for the initial run of 37,000 bibliographic records / 50,000 entries. The ongoing monthly maintenance requires less than 10 minutes of staff time and less than 2 hours of machine time. In addition, the monthly maintenance checks the URLs.

Is this all worth the effort? Definitely! These statistics are extremely useful for collection development, training for librarians and staff and developing outreach programs to meet the needs of the user community.

Do You See RSS in Your Future?
Paoshan Yue, Electronic Resources Access Librarian, University of Nevada, Reno Libraries;
Araby Greene, Web Development Librarian, University of Nevada Reno Libraries
Reported by Marie Waltz

RSS is a way to instantly distribute information to those who elect to subscribe. There are many uses for this technology. **Ms. Yue** and **Ms. Greene** discuss what they have learned about RSS and how they are using it in their library at the University of Nevada at Reno.

In order to understand this process they developed a glossary of unfamiliar terms.

Glossary
- *Weblog* (pronounced We-blog) is a website that contains articles or posts in reverse chronological order. They almost always include the RSS feed as an option.

- *Blog* is short for weblog. Blogs often have RSS feeds to push new postings to subscribers.
- *RSS* is an XML vocabulary. The actual meaning of the acronym is in some doubt. Some individuals say it is not even an acronym. Others say it stands for a RDF (Resource Description Framework) site summary, others say it means Really Simple Syndication.
- *XML* (eXtensible Markup Lanuage) is the standard format in which RSS is written. It looks similiar to HTML.
- *RSS Feed* is a RSS file meant to be "consumed' by people who subscribe.

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- *Aggregator/RSS Feed Reader* is either software one can install on their computer or a webpage that gathers the feeds you select and formats them in a readable format. Since RSS feeds are transmitted in XML, the reformating is important.

There are two versions of RSS technology, RSS version 1.0 (RSS 1) and RSS version 2.0 (RSS 2). Development of RSS was a long and bitter struggle, which is why there are two versions of RSS. RSS 1 uses RDF (Resource Description Framework) and so it may contain metadata. It is more complex to use for those new to the technology. RSS 2 is easier to use and if one does not need RDF features. The presenters feel it is a better choice. Both RDF 1 and 2 are modular, meaning you can get the basic RSS and then build on whatever features in which one is interested. Recently released is a new format called Atom. It is supposed to be an improvement on RSS. See Ben Hammersley's book: *Developing Feeds with RSS and Atom* for more information on Atom. Blogger.com, Google's blog, product uses Atom to create syndicated feeds.

RSS works by having a user subscribe to a feed; once subscribed a user is notified whenever the content has been updated. They can then read their subscriptions when it is convenient. You can read feeds via a feed reader or a web based "aggregator." RSS feeds allow a user to read whenever he wants and gives him only what he subscribes to (no spam.) RSS is used mainly for news and blogs. A lot of communication from RSS's is in the academic and business communities. People can share many types of media including photos and link lists. You can also get feeds to such resources as the New York Times and Wired.

Choosing an aggregator is not easy, there are many choices and they are almost always free. A list of some aggregators that you can use to read from the web is: Bloglines, Newsgator Online Edition, My Yahoo! And Pluck Web edition (for Internet Explorer). Readers that plug in to other applications are: Pluck (for Internet Explorer), Newsmonster (for Mozilla), and Newsgator (for MS Outlook). Standalone readers are probably going to go out of fashion very soon--because you can only receive your data from a PC, and everyone wants to get it all on their cell phone. If you want a standalone you can try FeedDemon, AmphetaDesk, Awasu, or RSSReader. You can use CNet reviews to help you make this decision. Search Google on "CNet reviews."

You can find lists of RSS feeds on a number of sites. Try Syndic8.com. On May 15, 2005 it had 388, 131 feeds, of which 298,610 were RSS feeds and 74,801 were Atom feeds. Another good choice is Aggregators, which give you a "starter list", divided into categories with searchable directories. You can also try Feedster, a feed search engine (www.feedster.com).

To find websites, look for an orange icon that indicates RSS is available. If you have a Browser integrated reader you can click on this icon to preview the feed. Otherwise you can copy the link and paste into your reader's "add feed" dialog box.

One important thing to remember about blogs is that 65% of blogs are not actively updated. This means you might want to update your feed reader fairly regularly to get rid of any dead wood. There has been an exponential increase in the number of libraries using RSS feeds. In October 2003, 49 libraries were producing 55 weblogs in the world; on May 15, 2005, 430 libraries were producing "who knows how many" weblogs. One interesting place to visit for more information on libraries and RSS is Blogwithoutalibary.net, a blog about blogs and libraries.

Some interesting ways libraries are using blogs are listed below with the websites for further investigation:

- Campus news: University of Wisconsin at Milwaukee what's new @ uwm libraries. (http://www.uwm.edu/Libraries/whatsnew/)
- University of Nevada at Reno has InfoEdge, a bi-weekly notification service for staff and faculty to update them on the latest new information resources and services offered by the Libraries. (http://www.library.unr.edu/services/infoedge.html)
- Subject guides: Georgia State University has a great list of RSS feeds provided by their library. (http://www.library.gsu.edu/news/)
- New Acquisitions: The University of Alberta uses RSS feeds to inform those who subscribe about new titles, one list by title and one by subject/call number. (http://www.library.ualberta.ca/newbooks/index.cfm)
- Book reviews: Colorado College Library allows users to subscribe to their in-house book reviews, written by library staff. (http://library.coloradocollege.edu/bookends)

- Catalog search queries: Hennepin County Library allows you to save your searches and then have the search redone whenever a new subject is added.
  (http://www.hclib.org/pub/search/RSS.cfm)
- Personalized Circulation information: Hennepin County Library uses RSS feeds to let patrons know when holds are available.
  (http://www.hclib.org/pub/search/RSS.cfm)
- Academic blogs: Uthink is a blog at the University of Minnesota. It is intended for the use of scholars to support teaching and learning in the University of Minnesota community.
  (http://blog.lib.umn.edu/)
- Subject list of RSS feeds: Ryan Memorial Library at St. Charles Borromeo Seminary in Wynnewood, Pennsylvania, maintains a subject list of RSS feeds relevant to their users.
  (http://www.scs.edu/library/feeds/rss.htm)
- Conference blogs: NASIG has a RSS feed for the annual conference.
- Publishers using RSS feeds: Biomed Central offers their publications' table of contents as an RSS feed.
  (http://www.biomedcentral.com/info/about/rss/)
- Oxford Journals offers a journal table of contents RSS feed also. Look for the blue button.
  (http://www.oxfordjournals.org/jnls/tocmail/)
- APS Journals, American Physical Society offers recently published articles and other content.
  (http://feeds.aps.org/)
- Nature Publishing, Nature offers headlines, summaries and links for all the new content published on their respective sites.
  (http://npg.nature.com/npg/servlet/Content?data=xml/02_newsfeed.xml&style=xml/02_newsfeed.xsl)

- E-journal updater, The University of Saskatchewan offers a list of RSS feeds from a number of e-journal publishers.
  (http://library.usask.ca/ejournals/rss_feeds.php)
- Hubmed: an alternative to Pubmed.
  (http://www.hubmed.org/)

At the University of Nevada at Reno they use RSS feeds for several publications, among them are *New Titles This Month and E-Journals with RSS Feeds*. They use Access to ensure accuracy and run queries, and a SQL server to store the data. Every month they import the data tables to the SQL server, which only take about a minute. They use ASP net (ASP=Active Server pages) to dynamically create the "New Electronic Journals" page and a RSS 2 feed for information stored in a SQL Server Database. Each file has an. aspx extension so that the IIS (Windows) web server will process the embedded ASP.NET script. The script is written in Visual Basic.NET language. It connects to the SQL Server and requests data from a stored query. You can also save the output to a static .xml file, or write directly to the server if you have permission. University of Nevada at Reno staff will probably change a lot of these processes once OCLC ERM is in place.Some suggestions for how the serials community can use RSS feeds: Create a blog on serials' librarianship and have many new subscribers or get an e-journal table of contents' feeds.

Will database search queries using RSS feeds be a common feature in the future? Anything that's updated regularly has the potential to be an RSS feed. RSS is here to stay. Everyone needs to start evaluating his or her websites for potential RSS feeds.

Analyzing How Much Publisher Packages Are Worth, or, How Many Zoology E-Journals Do You Have and How Much Are They Worth?
Nancy Macomber, Acquisitions Librarian and Government Documents Coordinator, Queens College/CUNY
Reported by Karen Fischer

Macomber presented a method for determining the answer to the question: "How many electronic journals does your library have in a given subject area and how much are they worth?" The purpose of undertaking such a project is that it may improve public relations by illustrating how many titles your library does own and their relative "worth" when you include consortial titles and databases. Additionally, the results may support departmental self-studies

and accreditation, and also help to increase accuracy in fund reporting and allocation.

To begin the process it is necessary to determine what to include on the list of journals. Macomber was primarily interested in scholarly journals, so she excluded Factiva, Lexis-Nexis, and JSTOR, since the titles in these sources are not for the current year. She also excluded open access and embargoed titles. To construct the list she used several sources: a locally

created list extracted from a local database of subscribed titles, Serial Solutions browse subjects list, Ulrichsweb, vendor price, subject lists and WorldCat.

There were twenty-nine hundred titles in Macomber's local e-journals database, and some of the fields included were vendor, LC class number (for subject sorting), and fund code. She started with this list of titles and then supplemented it with subject information from SerialsSolutions and Ulrichsweb. To determine price, she primarily used Ulrich's publisher price lists and the library's invoices.

Then Macomber compiled usage statistics, using the COUNTER Journal Usage 1 report from her various providers. These statistics were added to the local database. To finalize the calculations the number of titles in a certain subject area were counted, and the prices and usage statistics were also summed. There are many ways to sort this data which can reveal interesting information, such as overlap between databases, most and least used titles, and publishers/vendors which show the most usage. In addition, you can get some "big picture" information about usage and cost.

To assemble the data for individual databases, collect the total price paid for the database, the total usage of all journals in the database and the usage of titles in the database assigned to specific subjects. To calculate the portion of the cost that should be assigned to each subject based on use, use this formula:

Combined uses of titles in subject A
Divided by total uses for database Z
Multiplied by the total cost of database Z
Equals the amount to be charged to subject A

There are several advantages to using this approach:

- The cost is charged to subjects in proportion to actual not anticipated use
- More of the library's expenditures are tied to specific rather than general funds
- You do not have to stay within a subject when swapping titles due to duplication in consortial packages.

Macomber also addressed "issues," or disadvantages, of this method. They are:

- Interdisciplinary titles do not fit into a single subject
- Due to widely varying prices and different average prices for different subjects, can it be concluded that each use carries the same weight?
- Resistance to allocation changes
- You don't know who your users are
- Should centrally purchased packages be included?

Overall, Macomber said that the information gained is useful for broad reasons, but not necessarily for making specific decisions or allocation changes.

Presentations That Keep Your Audience Interested and Awake
Beth Bernhardt, Electronic Journals/Document Delivery Librarian, University of North Carolina Greensboro
Reported by Karen S. Fischer

Presentation style has a great impact on the effectiveness of conveying a message to an audience. **Bernhardt** presented basic tips on presentation style, visual aids, and tactics to engage the audience. The session was conducted as a class, with audience participation.

The session began with an illustration of what *not* to do when you give a presentation; Bernhardt held her notes in front of her face and read in a monotone voice. She received laughs from the audience and the demonstration served as an example of a poor presentation style. In order to get the audience thinking about different styles of presentation, four video clips were

viewed, and the audience was told to answer the following questions:

- What techniques did the speakers use to get their message across?
- How did the audience get involved?
- How did the speaker hold the audience's attention?
- How did the speaker use verbal and non-verbal techniques?

The excerpted video clips were: "I Have A Dream" by Martin Luther King, "Some Chicken Speech" by Winston Churchill, the "Keynote Address" by US Rep Barbara Jordon, and the "Inaugural Address" by John F. Kennedy.

Presentation techniques used by the speakers included repetition, use of hands, tone and voice, humor, distinct speech and repetition.

The first tip shared by Bernhardt was not to speak too quickly. One should not say more than one hundred forty words per minute and one should pause to take breaths. Maintaining eye contact is another important aspect of connecting with the audience. Tips for eye contact include speak to both sides of the room, look away from your notes and at the audience, read notes while pausing, keep eyes moving, and use an outline rather than prose for your notes.

Moreover, the use of hand movements can be distracting. Some suggestions for limiting hand movements were: hold onto the podium if needed, do not play with anything (like a pen), do not exhibit jerky movements, video tape yourself if you are brave enough, utilize meaningful movements, use hands for emphasis, and keep hands in plain view. The class then brainstormed on other tips that are generally helpful, such as, ask a question and wait for the answer, avoid fillers such as "um" (or any other repetitive word), use a roaming microphone so you can get out from behind the podium, do not move too much because it can be distracting, use facial expressions, breath deeply and know your content! Bernhardt noted that body language is an integral part of any presentation and it has the most effect on the audience.

The knowledge conveyed to the listeners increases when there is audience participation and the presenter's style is dynamic. Any kind of action or discussion among participants greatly enhances the learning experience, and a presentation becomes more of a teaching experience rather than simply reading one's ideas.

Bernhardt next posed the question "why do we use visual aids?" Some ideas shared by the audience were: pictures are worth a thousand words, draws the attention of the audience away from you, provides an outline for the audience, addresses different learning styles, adds variety, reinforces ideas, and helps the presenter keep on track with the content. Be sure to avoid including too much text on a given slide and try not to read the words on the visual aid exactly, but vary the words.

Effective visual aid techniques include blending a mixture of words and images, using charts and graphs, and being consistent with colors. If you are presenting a complex image, build it gradually so the audience can follow along.

In addition, Bernhardt suggested that handouts be given at the end of a presentation so that attention is paid to the presenter and not the handout. Bernhardt then offered a checklist for visual aids:

- Is it essential?
- Is it simple?
- Is it large enough?
- Is it labeled well?
- Is it interesting?

In conclusion, the audience compiled a list of tips and techniques of presentation style that will help them with future presentations.

- Use questions to involve the audience
- Have fun and add humor
- Breathe!
- Practice out loud
- Be prepared and practice
- Always have a backup
- Slow down
- Do not use hands too much
- Look away from notes
- Keep the structure simple
- Clearly thought out ideas
- Summarize at the end
- Use of stories
- Look at evaluations
- Know your subject

The RFP Process at the University of Memphis: A Work in Progress

Elizabeth Donald, Catalog Librarian, University of Memphis
Reported by Jerry R. Brown

Elizabeth McDonald, Catalog Librarian, Serials Specialist at the University of Memphis reported on the process their library consortium is following to develop an RFP (Request for Proposal) to choose a new integrated library system. The workshop focused on the basic organization needed to achieve their goals and concluded with a question/discussion time.

The University of Memphis has been a DRA customer since 1994. Most consortium member

libraries are within the Memphis, TN, area and serve a widely varied student community.

The University of Memphis Dean of Libraries announced the RFP project at the fall 2004 library retreat, stressing the need for excellent and on-going communication among all the concerned parties. The Dean made it clear that this was a high priority project that would affect the libraries for years to come. A task force was formed with representation from all the departments of the University library, except for Interlibrary Loan. It was decided that this small department needed to concentrate on their duties. Likewise, the Partner libraries decided that they did not have enough staff to assign someone to the project. To facilitate communication among all the consortia libraries, a dedicated web site was designed to be accessible only by the University and Partner libraries in order to maintain confidentiality of discussion, proposals, and decision-making. Meeting minutes were available within 48 hours, reports were posted for review and comment, and a timeline maintained to show the task force's progress. An advisory group of faculty and students was also created to solicit input from the wider university community.

The RFP task force was formed and began work in September, 2004. A timeline of one year was developed to guide the project. The process was divided into phases for clarity and control. Although it was recognized that this would be a lengthy, time consuming effort, the value of the process was recognized in that the new ILS is expected to be used for about ten years and must suit the needs of all the member libraries as closely as possible.

Phase I was scheduled from September to December, 2004. This time was devoted to setting up procedures, training the members of the task force, developing committee charges, organizing the subcommittees, and drafting planning documents. Early in the process, team building workshops facilitated an understanding of the writing process and how it would work. Charges were drafted by the subcommittee co-chairs, presented to the task force for further input, and then given to the Dean for final approval. This process helped the entire group appreciate how each task related to the whole, facilitating a more collegial approach to the process.

Phase II was scheduled for January through April, 2005 and devoted to a task force review of and revision of the subcommittee reports.

Careful editing for content, meaning, and document design resulted in some sections of the reports being returned to the originating sub-committee for revision and clarification.

Phase III is scheduled for May through August, 2005. When the documents are complete to the satisfaction of the task force reviewers, they will be posted on the web site for comment from all of the member libraries faculty and staff. Notification will go out via email of the postings and include the deadline for comments and suggestions. After the deadline passes, the task force will make decisions concerning the suggested changes and those decisions will be explained to the entire consortial community.

The final draft will be prepared by the task force and submitted to the Dean by 1 July 2005. The Dean will seek funding, and the RFP document will distributed. It is expected that the RFP will be ready for dissemination by fall, 2005.

McDonald discussed the disadvantages and problems discerned or encountered to date. Due to the large commitment of time by a substantial number of faculty/staff, this is an expensive process. The Phase I time frame did not allow for the time lost to various holidays and other member commitments during the fall semester. Motivating the entirety of the consortia libraries' faculty and staff to carefully review the documents and respond with their comments and suggestions in a timely manner has been challenging. Clarifying issues at an early stage of the process, i.e., the difference between system driven parameters and policies; and when and how input from outside the task force and subcommittees is needed and wanted, would smooth the process and enable more useful input from all concerned.

The following changes in the process would be implemented the next time. Site visits are a priority and a mechanism ism to increase faculty and student input is needed. However, the following benefits of the process were also presented. More than anything, the process has resulted in enhanced communication among the participating libraries, faculties, and staff. The opportunity for staff to discuss their frustrations with the current system helped clarify what they did and did not want from the new system. It also allowed assessment of the current processes and workflow within departments and led to discussions of how they could be improved in the future. Discussion and thought over a period of time allows everyone to participate and bring their expertise to the table

in order to suggest improvements. The process helps prepare everyone for the changes that are inherent in migrating to a new system and increases faculty/staff buy-in to the new system because they participated in determining the libraries' wants and needs from the beginning of the process.

In conclusion, McDonald stated the process is not finished. There is a lot more to do, but the exercise has been beneficial in building relationships among the consortia libraries and internally among faculty and staff. We have clarified what our wants and needs from a new ILS are and that will help us choose the system that best suits us without having too many second thoughts about the decision.

TOWN HALL MEETING
Elizabeth Parang, NASIG Secretary

This file contains working notes, not a polished report. Names have been removed. Items appear in the order in which they were said during the meeting, so some refer to previous items that may be several items back on the list.

Several hundred people attended the Town Hall meeting. The meeting was moderated by **Rachel Frick**, with **Joyce Tenney** and **Jeff Slagell** carrying microphones around the room to people who contributed comments.

Rachel opened the meeting by stating that private sector attendance and membership had dwindled to 12% and asked, What do you think?

1. There were a lot more vendors 16 years ago when he first attended – really misses them. They need to hear from librarians in a non-confrontational manner. We need to discover why they left.
2. Hope current commercial members will play a large part in determining how to gain more commercial members
3. Need their participation for effective programs and also for education of each other. *NASIGuides* are useful for education and information. Need to look at these and other publications to make sure all sides are represented.
4. First became interested in serials when she heard John Tagler speaking in a library school class about serials. We have a lot to learn from each other. Extend the student grant program to business students considering entry into publishing
5. Vendor demo held yesterday had standing room only. Attended Canadian conference that interspersed vendor forums among programs. Exhibits at ALA are a great learning opportunity. Need welcoming space for vendors in programming and open space
6. More programs of vendors and librarians working together, 'how we used it.'

Problem with exhibits is cost to vendors. Consider: co-presenting, special social events, survey.
7. Liked vendor forum; perhaps a publishers' forum could be included

Rachel asked for ideas about increasing Canadian and Mexican membership. Scholarships for students are available. How can we outreach to these members?

1. Didn't see the information on library school listservs. Get a Canadian representative to publicize to Canadian students. Have a special reception for Canadians
2. Only heard of NASIG last year; not enough ads in Canada
3. What is the outreach to library school students? [Slagell noted that Awards & Recognitions sends info to library schools but want to have a personal contact at library schools] Have received many applications for a job opening but only one mentioned NASIG membership
4. Alums at library schools could volunteer to post messages
5. A student grant winner noted she had seen the notice for the award on the school Web site but it hadn't been updated with this year's information.
6. One of last year's student award winners indicated he had found out about the award from a list; he again received a posting this year but with last year's information and so he immediately posted this year's information with his endorsement concerning his experience
7. Outreach to students has been a CEC topic of interest. However, lots of difficulties occur with library school faculty. CEC tried to offer programs but received no interest from the faculty. One person first heard about NASIG when Steve Oberg talked to her library school class. "You" should offer to talk at your library school.

8. If there is that much trouble getting library schools to post current award information, just ask them to send an email pointing to the NASIG website.
9. Need to consider why publishers are important to library schools; not every student will become a librarian. Greater involvement by commercial members will add value to library schools.
10. Library schools show erosion in general concerning technical services. Often no technical services class is offered. No as many students are going into technical services; retiring technical services librarians are often replaced by paraprofessionals. So NASIG needs to recruit these paraprofessionals.
11. Some schools do offer 'business of publishing' classes
12. Need to encourage library school classes to attend programs sponsored by NASIG
13. A problem exists with paraprofessionals affording membership. Could send letters to technical services head encouraging them to pay for their paraprofessionals to join NASIG.
14. Expand the vision of what is a 'serialst' – the speaker is now a reference librarian but continues to belong to NASIG because he uses serials. Need advertising to target reference librarians.
15. Offer institutional memberships that would reduce the cost for paraprofessionals.
16. Advertise at other library association meetings. The speaker saw a NASIG ad at the Music Library Association meeting.
17. Please consider a tiered dues structure for paraprofessionals and students. Students are a very low percentage of membership; cut their dues to $5.
18. Offer lifetime memberships
19. NASIG is absorbing the cost of currency conversion for Canadian and Mexican members; this was a factor built into membership.

Rachel next asked about conversation within the membership via NASIG-L and the *Newsletter* (the official record of organization business.) Should the *Newsletter* expand and offer columns on various topics?

1. Reads the title changes column the most of any part.

2. Should NASIG-L just include official business and a separate list be established for NASIG Chat? Or would that just duplicate Serialst?
3. People could opt not to subscribe to NASIG Chat but cannot unsubscribe from NASIG-L.
4. Make sure there is a subject line on messages; already has too many lists and doesn't need any more
5. NASIG does have a Bulletin Board for discussions
6. The session on RSS was good; NASIG could consider that technology or maybe a blog.

Rachel called for comments on other topics:

1. Photos were great on the history site; please continue
2. Disappointed that the Brainstorming session was not announced earlier; next time could it be later in the conference? [PPC co-chair Geller responded that already a lot is crammed into the schedule; perhaps should consider a full four day conference]
3. Another speaker indicated this was the least packed conference he had attended; felt there were huge gaps such as 45 minutes before lunch
4. Someone else pointed out this depended on the type of session attended
5. Page pointed out that NASIG is evolutionary and experiments every year. People have complained about the lack of time to get outdoors.
6. Publishers and vendors are great but reach out to colleagues in libraries such as collection development – especially in academic libraries. Paraprofessionals at her school do get travel money.
7. Another person noted her library doesn't distinguish between librarians and staff but base travel money on salary level.
8. Extend the conference. The morning vision session tied into the need to maintain lines of communication.
9. Bring back late night socials. [Savage noted that next year's hotel does have a space for socials and networking opportunities]
10. Please use listserv and/or contact Board members to share additional ideas!

BUSINESS MEETING
Elizabeth Parang, NASIG Secretary

WELCOME (SAVAGE)

At 10:30 a.m., May 22, 2005, Steve Savage, NASIG President, welcomed everyone and called the meeting to order. He announced Connie Foster would serve as Parlimentarian for the Business Meeting.

INTRODUCTION OF THE 2004/05 BOARD MEMBERS (SAVAGE)

Board members were introduced as follows: Mary Page (Vice President/President-Elect), Denise Novak (Treasurer), Elizabeth Parang (Secretary), Members-at-Large Beverly Geer, Jill Emery, Judy Luther, Kevin Randall, Stephanie Schmitt, and Joyce Tenney. Anne McKee (Past President) was not able to attend. Savage thanked all for their service

HIGHLIGHTS FROM MAY 2005 MEETING OF THE EXECUTIVE BOARD (PARANG)

Secretary Elizabeth Parang presented the following highlights from the May 18, 2005 Board Meeting:

- Due to the popularity of pre-conferences, next year's PPC will be asked to offer more, particularly the one-half day ones – with some in the morning and some in the afternoon.
- The NASIG CEC Online Education Task Force final report will be made available on NASIGWeb. The report discusses possible scenarios and software for continuing education programs.
- The Publicist is the official voice of NASIG. The Publicist should handle all PR going outside of NASIG that is about NASIG events.   The NASIG brochure will be revised.
- The Board is looking into adopting "Creative Commons" as the default approach for most NASIG publications.
- Richmond, VA, New Orleans, and several sites in Canada are being investigated as sites for future conferences.
- A Technology Plan will be considered. This will start with studying and evaluating the current use of technology by committees. An optimum structure to implement technology to support committee work will be recommended.

- The Web site must be overhauled and updated.
- The debut of the *UKSG Serials E-Newsletter* was warmly received by the NASIG membership.   News of the U.S. serials community will be contributed to the U.K. version.
- The initial implementation of the Financial Plan will include the creation of two new committees: Development   and Membership.
- We need to make sure conferences have features that will make employers want to send employees.
- Possible themes for the future direction of NASIG include, "The future is what we were", "Getting back to basics", and "Establish NASIG as a community."

HIGHLIGHTS FROM THE BRAINSTORMING SESSION (PARANG)

The topic announced in advance was membership development within the commercial sector – get back to what NASIG originally was. At Saturday's Vision Session you heard Tina Feick mention that approximately one-third of the original membership was from the commercial sector.

Suggestions at the Brainstorming session included:

- Target letters to small publishers who aren't familiar with NASIG
- Publicize that our existing awards are open to all members of the serials industry
- Send messages about specific programs of interest to non-library lists
- Utilize the theme to publishers: Let NASIG be your library advisory board
- Create a set of brochures specifically targeted to various subsets of non-library based members
- NASIG was intended to be a dialogue.
- We need to address the problem of sharing vs. selling – start a discussion on the list and develop a best practices publication outlining what is and is not allowed in program presentations.
- Publisher bashing is not conducive to participation for publishers or vendors

- Have conference programs and /or use the *Newsletter* for Point/Counterpoint discussions
- Broaden the types of user group meetings
- Need to analyze the types of commercial sector members and conference attendees with the purpose of determining which groups are missing and why
- The intent of all this discussion is to get NASIG back to what was originally intended and what was the case for many years – just as Tina discussed.
- We hope the Town Hall Meeting at 11:00 will continue this discussion.

TREASURER'S REPORT (NOVAK)

Treasurer Novak reported that NASIG is in a good financial position, with approximately $324,600 in equity; however, almost all of the bills from the conference are still to be paid, which will reduce that figure considerably.

PRESIDENT'S REPORT (SAVAGE)

Savage reminded those present of the need for a civil and respectful discourse among all members of the serials industry. He extended thanks to the 130 members of NASIG committees and task forces and also to their employers for allowing them the time to work on NASIG business.

OLD BUSINESS

None reported.

NEW BUSINESS

Savage introduced the new members of the 2005-06 Executive Board as follows: Denise Novak (Vice President/President-Elect), Rose Robischon (Treasurer), Members-at-Large (Adam Chesler, Katy Ginanni, Kim Maxwell).

Drawings were held for a full conference registration for either 2006 or 2007 and a NASIG quilt created by Martha Burk. Susan Banoun, a first timer, won the conference drawing. Rose Robischon won the quilt. The drawings raised approximately $4500, about three times the amount raised last year. The money raised last year was used to finance an additional student award.

Next year's conference will be held May 4-7, 2006 and events in the NASIG calendar will be adjusted accordingly. Savage introduced the 2006 Conference Planning Committee chairs, Paul Moeller and Wendy Highby, and the 2006 Program Planning Committee chairs, Rachel Frick, Tonia Graves and June Garner. Paul and Wendy introduced Denver as a land of few lakes but lots of snow (it'll melt fast). They conducted a drawing for items from a Denver gift bag: water bottle (Douglas Kiker), native craft candlestick (Victoria Stanton) and gold ore from Colorado (Jennifer Edwards)

ADJOURNMENT

There being no further business, the 2005 business meeting was adjourned at 11:07 a.m. and the 2005 Town Hall commenced with the introduction of moderator, Rachel Frick.

POSTER SESSIONS
Reported by Rachel Lee

There were eight poster sessions at this year's meeting - six focusing on managing electronic serials, one on changing serials vendors and it seemed appropriate that the eighth examined managing stress levels in a serials' environment!

Developing a Customer Database System for Managing Electronic Resources
Maggie Wineburgh-Freed, University of Southern California, Health Sciences Campus

When the University made the decision to upgrade the database and server that created the web pages for the eResources, the library took this opportunity to add management information to the existing content. This created a system that addressed the unique challenges presented by managing electronic serials.

The new system is a single resource which addresses the needs of both the library staff and the public. Librarians can now enter and amend information about licensing, vendors, ILL and make administrative changes, while a separate interface supports searching and displays licensing information for the public.

Electronic or Paper Format? Issues Influencing Decisions

Michelle Grace and Victoria Peters, Minnesota State University

Following internal discussions regarding the transition from print to electronic serials, a survey was created to explore the rational of changing from print to electronic journals that were purchased for all academic libraries across campus. This poster session analyzed the 166 responses.   The results revealed that instructional delivery methods and remote access options have little to no impact on choice of preferred serial format and that the average ratio of print to serials electronic format is 56.65:43.45 %.

The most popular method for accessing backfiles was "Library Retains Print with Cost,"

which was the leading factor when choosing one format over another (89%). Buying "Both for One Price" was the biggest consideration when retaining print (76%).

In summarizing, the survey noted that practical considerations were the motivating force behind library purchasing decisions. In addition, libraries need to define ILL terms when negotiating licenses, obtain faculty feedback for preferences and consider archival access needs.

The full survey is available online at: http://www.lib.mnsu.edu/staff/peters/Poster%20 Presentation%20NASIG.pdf

SUNCAT: Building a Serials Union Catalogue for the UK

Liz Stevenson, University of Edinburgh

A major project, to unify serials holdings in the UK is being undertaken by the SUNCAT team. The scheme was borne out of a need to improve access to serials' holdings information as well as serials' records themselves.   The SUNCAT catalogue currently lists the holdings of 22 of the largest research libraries in the UK as well as records from the CONSER database and the ISSN register.   Currently   SUNCAT (http://edina.ac.uk/suncat) has four million titles; an estimated 90% of the titles held in the UK.

Phase 2 of the project is now underway with a further 60 libraries scheduled for incorporation into the database.

The poster session outlined the UK context for Serials Union Catalogues, the involvement of additional   project   partners   (vendors   and librarians) and the challenges facing the project in the form of the quality of bibliographic records, matching and ejournal content.

Moving E-Serials and URLs Out of the Catalogue Using SFX

Jonathan David Makepeace, University of Windsor

Librarians at the University of Windsor had to move cataloguing information out of Voyager using SFX and this poster outlined in detail the work undertaken to achieve this. In order to provide links to electronic resources, an SFX database   must   contain   detailed   holdings information and URLs – information that is currently duplicated in the library's Voyager integrated library system.

Concerns were raised about reporting detailed holdings to Libraries and Archives Canada and OCLC once they disappear from the catalogue. There were also doubts about the accuracy of holdings data in SFX. However, staff time saved by no longer having to duplicate e-serials holdings and URLs in the library catalogue has been the overriding benefit of this new system.

For further information:
http://Makepeace.ca/nasig

E-Journal Training in a Time Crunch: A Template to Re-Tool Acquisitions Departments

Wendy Highby, University of Northern Colorado

The problems of staffing in an e-serials' environment were addressed by the creation of a bespoke nine-week training schedule. The training aimed to inform and educate current librarians at the University of Northern Colorado

of the specific and special demands created when managing serials' holdings.

Each weekly session dealt with a particular topic and carried a specific goal along with homework for the participants. Those with electronic serials

management experience were paired into teams with another librarian thus facilitating the sharing of skills. In the rapidly-changing electronic environment, this course helped librarians grasp new issues involved in managing e-serials and fostered a more team-orientated environment.

Tracking and "Check In" of Electronic Journals: A Homegrown Solution
Amanda Yesilbas, Florida Atlantic University

Florida Atlantic University, in common with many other universities, is making the transition from print to electronic. With this shift come new challenges presented by managing electronic resources. While the University makes preparations for a fully integrated library management system, contingency plans have been created in the form of a Serials' Management Database.

This database deals with the issue of "checking in" an electronic serial by generating a daily list based on the frequency of publication. Access is then tracked down to the .pdf level and "checked in" to the database.

The net result has been that the FAU has not only been able to keep pace with the electronic environment, but has also managed to untangle a number of access and registration issues.

Using Innovative Interfaces' Millennium Software, Excel and Old-Fashioned Teamwork to Change Serials Vendors
Kathy Kobyljanec, John Carroll University

In common with the previous poster, this University also created a bespoke method to manage a transition phase within the library. In this case, John Carroll University decided to change vendors at a time when the library was involved in a mid-cancellation project.

In organizing the project, the library established a clear set of processes for reviewing the proposed cancellation titles. This involved deciding on a process to remove titles, review renewal lists from the previous vendor, create lists in Millennium for the new vendor, review subscription dates, sort records and identify any potential problems.

In addition to these core procedures, additional issues were identified with regard to the overlap and differences in business between vendors.

De-Stressing for Serialists
Wendy Baia, University of Colorado

Clearly, the fast-changing environment in libraries, coupled with decreasing budgets is not only stressful, but presents demands unique to the library field.

As a foretaste of her contribution to the book *The Successful Academic Librarian*, this poster

session "Stress and the Library" revealed current sources of stress for librarians and suggested ways that this might be alleviated.
The poster was tailored specifically for serials' librarians.

INFORMAL DISCUSSION GROUPS

Cataloging Discussion Group
Facilitator: Mary Grenci, Serials Catalog Librarian, University of Oregon
Reported by Shana L. McDanold

The session opened with **Mary Grenci** introducing herself and presenting the first two topics: vendor supplied records and are libraries union-listing their electronic journals. The group first discussed vendor supplied records and several issues surrounding them. One person asked for a comparison between Serials Solutions vendor records and Marcit regarding quality, record source and flexibility. Various

individuals discussed their library's experience with Serials Solutions including customization of record source and record content, aggregator neutral separate records de-duping projects, how holdings information is supplied by Serials Solutions and how the single record system is not possible using vendor supplied records. Indiana University discussed their use of Serials

Solutions records and how they fill in the gaps by authenticating vendor records.

The discussion then moved on to the debate between a single record system and a separate records system. Mary asked how to extract the electronic holdings data from print records. A discussion followed, but no resolution/solution was found other than manual extraction from each individual holdings record.

The discussion migrated on to union listing and LDRs for electronic journals. Reasons for union listing include knowing what a library owns to prevent errant ILL requests and the ability to lend these materials (preventing revenue loss from the movement to e-only journals). The main reason against is licensing issues which can be prevented through careful negotiation.

Cataloging items in aggregators was the next discussion topic. A participant asked if libraries do and why. California libraries, as a consortium, catalog everything, aggregator title or not. Other libraries catalog aggregator titles on the basis of requests or selections, or if the print is cancelled and they are relying on the electronic version only.

The discussion morphed into the manual updating of records and how to keep up in the rapidly changing environment. California libraries use a PURL server, so rapid changes can be made to the URLs in the PURL database without having to go in and edit the records. Global updates are another way to quickly change URLs that are in the catalog. If the library uses vendor records they force the vendor to keep up with changes for you.

The next topic was the display issues surrounding single versus separate records. Some libraries contend that separate records are easier with the use of uniform titles, and you can link them together in the OPAC so that they function like a single record. This brought up the role of FRBR in the display and how it may affect such issues by linking all versions to a single parent "work" record.

This moved into a discussion of title changes and ceased print titles with ongoing online. The question was asked, do you create a new record for the online version if the print ceases but the online continues? The answer, according to the rules, is yes (new format, new record). However, not all libraries do this, and the possibility of just adding a note such as "print ceased with v.x" was mentioned. In regards to title changes, frustration was expressed at the fact that online sites often do not display title changes at all. Often e-journals act like integrating resources by dropping the old title entirely, with no evidence of it remaining anywhere on the site. This leads to the possibility of multiple records, one with the old title and one with the new title, and no link between the two records to reflect the change. If the librarian is aware of both the old title and the new, the suggestion was made to use the integrating title rules so that both titles are reflected on the record, removing the possibility of multiple and unlinked records.

At this point, Mary asked for additional topics. When none were suggested, the discussion meeting was adjourned.

Public Libraries Discussion Group
Reported by Stephen Headley, Manager, Magazines and Newspapers Department, Public Library of Cincinnati and Hamilton County

A small group of five public librarians (about half of all public librarians registered at the conference) met to discuss the role of public librarians in NASIG.

The first topic addressed was how to promote NASIG to public librarians. One step has already been taken, Stephen Headley, Professional Liaison to the Public Library Association (PLA) for NASIG, has proposed a program to be included at PLA's National Conference in Boston in 2006. The proposal is to set-up a Table Talk program that would be similar to NASIG's Informal Discussion Groups. A decision will be made in September to accept or reject this proposal. The idea behind this proposal was to have the serials community represented at this conference and use it as an opportunity to promote NASIG. It was also suggested that perhaps NASIG could have a table or booth at the PLA Conference. Another idea was to have a message posted on PUBLIB, a listserv for public librarians, providing personal "testimony" as to what positive experiences individuals had at the NASIG Conference. Hopefully, this would encourage interest among other public librarians. In addition, setting-up a link to the Quick Guide for the NASIG Conference programs would be helpful on the PUBLIB listserv. Other ideas to promote NASIG to public

librarians were: posting to SERIALST and inviting public librarians' to join NASIG, making public library administrators aware of the educational opportunities at NASIG, and direct marketing to public library systems surrounding and including the host site prior to the NASIG Conference.

The other topic discussed was possible ideas for future public library-oriented programs at NASIG. Programs suggested were: online vs. print in public libraries; finding materials to match changing populations (such as ethnic, language or religious groups) and to serve the great diversity of the public library communities (ages, genders, and educational levels); branch library vs. central or main library issues; and different funding solutions for different libraries.

Lastly, provide an opportunity for public librarians to have an informal get-together with no conflicting programs, presentations, or other activities at the NASIG Conference.

USER GROUPS

Endeavor Voyager User Group
Margaret Rioux, Systems Librarian, MBLWHOI Library;
Susanna Powers, Serials and Electronic Resources Librarian, Tulane University Library;
Jana Brubaker, Catalog Librarian, Northern Illinois University
Reported by Jana Brubaker

Thirty-two Endeavor customers attended this user group and twenty-eight individual libraries were represented. Most were Voyager users, but EnCompass and LinkFinder Plus customers were also represented. The session was held as an open discussion with broad-ranging questions and answers.

Several of the attendees' home institutions have implemented Voyager with Unicode. The implementation of Voyager with Unicode primarily impacts cataloging. Questions arose about font requirements and users responded that any font may be used, but Arial unicode and Lucida unicode are recommended. The next release will be Voyager 5.

There was a discussion about LinkFinderPlus, Endeavor's link resolver software. Those using it found that getting started was labor intensive, but it was nice once that was accomplished.

Spine label printing was another topic of discussion. A few attendees are printing labels from Voyager, but they have to be reformatted. Nobody is printing labels from OCLC Connexion Client.

In addition, the group discussed Meridian, Endeavor's electronic resource management product. There was great interest in the labor-saving possibilities of this product since it would eliminate the need to enter electronic resources-related information multiple times. It also makes this information accessible in one place to all departments. Some attendees, however, expressed concern that the cost would be prohibitive.

Innovative Interfaces User Group
Facilitators: Wen-ying Lu, Catalog Librarian & Linguistics Bibliographer, Michigan State University;
John Wiggins, Head, Technical Services Drexel University
Presenter: Ted Fons, Innovative Interfaces
Reported by Shana L. McDanold

Wen-ying Lu and **John Wiggins** began the after lunch presentation with a highlights summary of the Innovative Users Group (IUG) Meeting in San Francisco in early May. Full reports and presentations can be found on the Innovative users' website: http://innovativeusers.org/ and CSDirect website. John Wiggins and Andrew B. Copnick talked about some of the sessions they attended. These included: creating lists and expressions to move data, Millennium, Richard Jackson's session on regular expressions, creating lists as the Swiss army knife of the system, MS Access use for database clean-up and maintenance, the web based MARC load manager, XML catalog version, MilStats functions and the different uses of the bindery functions.

Following the IUG highlights, Lu introduced **Ted Fons** of Innovative Interfaces who gave a presentation on the Millennium Electronic Resources Management (ERM) and Millennium Serials modules. The ERM module presentation

consisted of an overview of the module's features, the difference between integrated and non-integrated use of the module (it is designed to be a stand-alone if desired by the library), its history, what's included in the ERM, a list of the current libraries using the ERM, examples of public views, an overview of the specific staff functions, benefits for staff and patrons, the benefits of integrating it with other Millennium modules, and an overview of the 2005 release.

Ted then described the new partnership with WebBridge and Google Scholar to make library holdings data part of Google search results. WebBridge provides the holdings file that Google Scholar mines and puts the data in the results displays. Currently beta testing is underway at the Michigan State University and the product will be part of the 2006 WebBridge release.

Finally, Ted presented on the 2005 release's new features of Millennium Serials. These include a staff note now available in check-in record boxes so that a public note and a staff note are possible, access to item records from the check-in box (links between boxes and items can now be created), and customizable status labels for check-in boxes in the staff view. Highlights from the preliminary 2006 release include new custom claims' forms, jumping with claiming by review files, custom check-in box colors for some statuses, and the possibility of suspending a routee without having to delete them from the routing record (for routees on sabbatical, for example).

The session concluded with a question and answer session with Ted Fons. Q1: Electronic invoice processing – the system cannot process multiple invoices from the same record. The first invoice must be processed before the second one can be. A1: Ted will take this problem back to Innovative to be worked on. Q2: Can claim forms be customized? A2: More formatting options for claim forms will be part of the 2006 release. Q3: Can we get help with analysis or merging data from Project COUNTER? A3: The first requirement is a good selection of data to work with in the database. That is the current goal, to build these databases. Innovative has ideas for future development including integrating data with other systems for analysis but they want and need more ideas. Q4: Will volume and numbering be added the coverage database? A4: Only chronology right now because that is the nature of the current existing data. Hopefully room will be made in the next release to include volume and numbering information as well. Q5: How can libraries document collection development decisions? A5: By managing their acquisitions workflow and storing decisions on products. Q6: Is it possible to search in multiple attached records (i.e. the bib record and the order record and the check-in record at the same time)? A6: Not yet, it's tricky because of interaction, but do keep suggesting it for future development. Q7: What is the matching logic for record loads? A7: The old system was ISSN and title match. Now users can pick what number they want to use for the matching logic, but that number must be indexed in the bibliographic database (such as an OCLC number or the Serials Solutions number). Q8: With the addition of staff notes to check-in boxes, what happens to the current notes? A8: All current notes will be treated as public notes since that's what it is now. Libraries will have to move staff notes themselves.

At this point, Lu asked if there were any more quick questions as the session time was about up. When no more questions were raised, Lu thanked Ted for his time and the session was adjourned.

CONFERENCE PHOTOS

If you were there, these photos should bring back fun memories of NASIG's 2005 conference in Minneapolis where we celebrated NASIG's 20th anniversary! If you couldn't make the conference, then look what you missed:

20th Anniversary Skit: Where's the Dorm?

20th Anniversary Skit: Dorm Life II... Pets?

**20th Anniversary Skit:
Dorm Life.... the Towel Saga**

Members of CPC at the Registration Desk

Check out the NASIG Photo Website, http://www.nasig.org/conference/photos/2005%20Minneapolis/index.html, for more pictures!

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PROFILES

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MARY PAGE, NASIG PRESIDENT
Reported by Maggie Rioux

After reading NASIG President Mary Page's CV and getting her answers to questions in my email interview with her, I think I can safely conclude that she has only one serious fault: she is a New York Yankees fan. Now, this may not seem bad to most of you, who live in the less-favored parts of the world (that is, outside the Northeast USA), but around here, it's serious (especially for those of us who only really became Red Sox fans after last fall's World Series). But I guess I can forgive her even this – it's not her fault. For despite the fact that she grew up and has spent most of her life in New Jersey, she was actually born in the Bronx, a stone's throw from Yankee Stadium.

Did I say Jersey girl – yup, that's right. Moved there before she started elementary school and been there ever since. Undergraduate degree from Rutgers, then right into library school, also

at Rutgers; worked for Princeton, New Jersey Institute of Technology and the New Jersey State Library. Then in 1989 back to (you guessed it) Rutgers, where she's been ever since. Mary says she did actually get accepted to library school at Simmons in Boston, but chose Rutgers primarily for financial reasons. (note to Mary – you can practically see Fenway Park from Simmons – you would have had to change your ways if you'd gone there).

Mary and her coffee

Mary has had four positions at Rutgers, always in tech services. She says it's a great place because it's big enough that you can easily move around and up as interests and experience develop without having to leave. Since 2000 she's been head of the Acquisitions Department. She gets to oversee both print and non-print acquisitions and sign all those great license agreements for digital resources. Rutgers has also been very supportive of her increasing involvement in NASIG over the years.

During her first few years at Rutgers, Mary kept hearing about NASIG and wanted to attend, but at that time she had already been attending ALA for several years and was having trouble (don't we all!) justifying two conferences scheduled so close together. However in 1996 she was working in Rutgers' Library of Science and Medicine, where serials were the primary focus of the collection, and she was also involved in budget-driven cancellation projects, usage studies and efforts to figure out this new digital stuff. So she bit the bullet, joined NASIG and headed off to the University of New Mexico for her first NASIG conference adventure. She says she remembers feeling "simply exhilarated during the conference." Mary claims it was because she was learning things she could actually use in her work. Of course it could have

been the effect of the altitude on our sea-level-dwelling serialist, but probably not – I think we all shared this same feeling at our first NASIG.

The next step was to get our Mary more involved in the organization. She was really hooked and started referring to NASIG as her "content conference" and ALA as her "trade show conference," both important, but in different ways. The next step was to fill out a volunteer form in January 1997. Because she had done some conference planning for other organizations, incoming President Susan Davis tapped her for PPC for the 1998 conference (University of Colorado). After a year to recover and forget how much "fun" it was on PPC, Dan Tonkery tapped her as PPC co-chair for NASIG 2000 (UCSD) and she stayed on for another year as co-chair for 2001 (Trinity redux). Mary credits her PPC experiences, serving with the likes of Susan Davis, Judy Luther, Cindy Hepfer and Mike Markwith, as a major influence on herself and her career as a serialist. They were great mentors and taught her NASIG, conference planning and being a serialist. One thing followed another and she was elected to the NASIG Executive Board as a Member-at-Large and then as Vice-President/President-Elect.

President Mary Page with predecessor Ann McKee, successor Denise Novak and role model Mary Tyler Moore

As have most of the NASIG leaders I've interviewed for this profile series, Mary has found NASIG an easy organization to get involved in. "If you are willing to work hard, NASIG has a place for you and you will have the opportunity to work with some of the best and the brightest in the serials industry." (Personally I count Mary Page as being among that group.) To wrap things up, I asked Mary what else she does in her life besides NASIG and technical services stuff. She told me about some pretty interesting things. First at Rutgers: She was recently appointed to the Athletics Academic Oversight Committee for Rutgers' Division I teams. This committee is responsible for making sure nobody forgets the student part of student-athlete and she has gotten to learn a lot about sports and the NCAA and also to know some interesting athletes and coaches as well as faculty from other disciplines. Do you suppose she gets good tickets to the football games as well? I think it's great that Rutgers includes a real live librarian on such a committee.

And when she's not doing Rutgers stuff? Here's a few of the multiple dimensions of our President. She likes to walk in Manhattan and admits to owning an iPod. She follows college basketball and New Jersey politics (now there's a combination). She also admits to testing her memory by trying to remember lyrics to Girl Scout camp songs, especially when trying to stay awake in boring meetings, but not out loud (hmm, good thing that NASIG meetings are never boring).

Mary also says that she takes lots of razzing because she's proud to live in New Jersey and thinks it's a beautiful state. She asked me to share with you all some of her reasons. First off, she can be in Manhattan in just a few minutes but she doesn't have to live there. She can be at the Jersey shore in an hour or two with its beautiful beaches and old summer colonies like Cape May. There's ethnic food of every shape and size, mountains, rivers, state parks and national recreation areas. Why even the Statue of Liberty is actually in New Jersey! Mary's even such a New Jersey nut that she finds a rugged beauty in the industrial scenery along the Turnpike and thinks the oil rigs at night look like a delicate sculpture. This may be going a bit too far, but I will try to look at it from a different angle next time I'm down that way. I readily admit that the rest of it sounds enticing.

So there you have it, a portrait of our new NASIG President. Next time you see her, ask her to sing Kum Bay Yah for you but don't ever, ever mention last year's American League Championship series in her presence if you want to survive.

Go Sox!!

IN MEMORIAM

Judith Carol Wilkerson, a long time member of NASIG, died June 10, 2005 in Oklahoma City, Oklahoma after a seven month battle with non-Hodgkins lymphoma. She was employed as Head of Serials Services at OU Health Sciences Center in the Robert M. Bird Health Sciences Library. In 1985 she received the Master of Library and Information Sciences degree from the University of Oklahoma. She served an internship at the National Cancer Institute, Bethesda, Maryland, in 1985. From 1985 to 1990 she was employed by University of Texas Southwestern Medical Center at Dallas as a librarian. Her last 15 years have been dedicated to professional medical librarianship at the OU Health Sciences Library.

IN MEMORIAM
Marla Schwartz, 1949-2005
Contributed by Beverley Geer

On 8 August 2005, our good friend and splendid colleague, Marla Schwartz, died from complications of ovarian cancer.

I met Marla one morning at breakfast at the 1988 NASIG conference at Oglethorpe University in Atlanta, Georgia. I liked her immediately, and we became friends. In 1990 we started rooming together at ALA, a tradition that we continued until 2001 when Marla's illness curtailed her professional activity.

I don't think she'd mind my telling you that she was very fussy, delightfully so. For example, it quickly became clear that Marla had expectations and standards where hotel rooms were concerned, the quality of the bathroom being especially important. So I let her pick the ALA hotel each time, and that generally worked out. I'm sure she'd agree that we had a banner year in 1995 (ALA summer meeting in Chicago) when we stayed at the Palmer House and had two bathrooms! How, I hear you ask, did she deal with the dorm rooms at NASIG?! Like a soldier, believe me, but she was not unhappy when we moved to hotels.

I have Marla to thank for showing me the ALA ropes. She gave me very effective advice on how to get involved, and by golly, in 1991 I was appointed to the Serials Section Education Committee, serving alongside Marla. After that we traveled a very similar path in Serials Section, even going so far as to be elected chair in successive years, me first and then Marla.

I have lots of Marla stories to tell, as do many of you, and over the years, I learned a lot about her. For instance, she preferred to take the train, she loved to buy shoes, lobster was her very favorite food, and every August she and her husband spent a week in Ogunquit, Maine. Did you know that Marla was born in Washington, DC? Except for the years she spent in Boston while going to college, she always lived in the DC area, most recently in Bethesda, Maryland. And my favorite Marla fact is that during her college years in Boston she had a most interesting job: she worked in a head shop.

A couple of days before she died, I visited her in the hospice. The following segment is from an e-mail message I sent to a few people after seeing her: "Steve Murden met me at my hotel and drove us to the hospice. We spent an hour or so with Marla, along with Marla's sister, Linda, and Linda's husband, Bruce. Marla's husband, Howard, was taking a break.

The hardest thing was the shock at seeing her diminished physical appearance; such a stark change from when I saw her in mid-May. She is very thin, pale, and extremely weak. She struggles to speak and her voice is so small and quiet, but you can tell she wants to talk. And she makes a very sweet effort to smile. She says that she has no pain or discomfort. She is able to take ice chips and a bit of Gatorade. She likes to be touched so I held her very gaunt but warm hand off and on during the visit, as did her sister. She doesn't want to be alone. There is a picture of her and Howard in Maine next to her bed, plus a stuffed cat that resembles her own cat, Chatte. She says that the toy cat actually does what she tells it."

The next day I returned to spend more time with her, and we all noticed that she was weaker and so very tired. Early in the day when I was alone with her she touched my face and thanked me for coming. I finally mustered the nerve to say good bye to her around 5 pm. She put her arms around me, I put my head on her shoulder and she patted my back while I cried. Marla wasn't fussy on that last day.

If you would like to honor Marla, please send donations to:
The Ovarian Cancer Research Fund
14 Pennsylvania Plaza
Suite 1400
New York, NY 10122
http://www.ocrf.org

Marla Schwartz, 1949-2005

[Ed. note: This tribute and others will be published in Serials Review, v. 31, no. 4 (2005).]

CALLING ALL SERIALISTS

Sharon Heminger

In our last Calling All Serialists column, we printed several great responses to our call for NASIGers to share their "non-library" collection interests. Did you say to yourself, I wish I'd shared my collection of ... cats? Kewpie dolls? curios? It's not too late! Send them to us now (a brief description and a digitized photo or two), and we will print more in our December issue.

Did you miss that last cool article? See: http://www.nasig.org/newsletters/newsletters .2005/05may/05may_other_nasig_news.html #CALLING

Email Sharon Heminger, heminger@jstor.org with your submissions.

PROFESSIONAL LIAISONS UPDATE

[Ed. note: compiled from information submitted by NASIG's Professional Liaisons for the May board meeting.]

Stephen Headley,
Public Library Association (PLA)

A program on periodical collection development issues in public libraries was proposed for PLA's next National Conference in 2006 by two NASIG members, myself and Abby Schor. It was not accepted as a program, but the National Conference Program Subcommittee suggested submitting the idea as a "Talk Table," which is similar to a round table discussion. This was done, although there won't be any notification until September. The hope is to make serials issues visible at the National Conference and to establish contacts with other attendees interested in serials issues. In this way, NASIG can be promoted to a group that is largely not involved with NASIG.

At the 2005 NASIG Conference there will, once again, be a program focusing on public libraries as well as an Informal Discussion Group dedicated to public libraries. Hopefully, with this small presence on the list of programs and events, other public librarians will be encouraged to attend the Conference. At the Informal Discussion Group, one of the topics will be how public librarians can be more visible within NASIG and how NASIG can attract public librarians.

Trina Grover,
Canadian Library Association (CLA)

Planning is underway for the CLA Annual Conference, to be held in June in Calgary, Alberta. The Technical Services Interest Group (TSIG) and the Serials Interest Group (SIG) have jointly sponsored two events in addition to the Annual General Meeting: A program entitled "Reorganization of Technical Services in Your Library" will present theoretical and practical ideas for how technical services departments might be reorganized. A full-day preconference on "Basic Subject Cataloguing with LCSH" (based on the recently developed PCC workshop materials) is also on the agenda, to be delivered by Linda Woodcock of the Vancouver Public Library.

The Serials Interest Group was thrilled to receive a NASIG CEC grant to support an SCCTP workshop on Cataloguing Electronic Serials, held March 18 on the Ryerson University campus in Toronto. The workshop was successfully delivered by Peter Glenister, who is the Bibliographic Services Librarian at Mount Saint Vincent University in Nova Scotia. Many thanks to CEC, and to Peter!

SIG and TSIG welcome comments about our activities, suggestions for future endeavours and questions about membership. Please write to us.
SIG Convenor Trina Grover:
tgrover@ryerson.ca
TSIG Convenor Wayne Jones:
jonesw@post.queensu.ca

Frank Richardson,
American Association of Law Libraries (AALL)

The 98th AALL Annual Meeting & Conference is July 16 - 20, 2005, San Antonio, Texas. The theme for the 2005 Annual Meeting is Strategize*! Values Visions Vistas.*
Selected AALL Technical Services Special Interest Section meetings at the conference:
- Easy Does It: EDI Made Simple
- Strategize & FRBRize Your OPAC

- Who's Counting? Who Cares? Revisiting the ABA Statistics Issue
- Electronic Resources Management

Hien Nguyen,
Library of Congress - CONSER

Conferences:
- CONSER Operations Committee Meeting, May 5-6, 2005 at the Library of Congress. The agenda is available from the CONSER Web site (http://www.loc.gov/acq/conser/ops-05-home.html).
- CONSER Meetings at ALA Annual: CONSER Task Force on Publication Patterns and Holdings/Publications Patterns Discussion Group; CONSER At-Large

Agendas for these meetings will be made available in June on the CONSER Web site (http://www.loc.gov/acq/conser/)

CONSER Documentation:
Update 2 of the CONSER Cataloging Manual has been issued in early 2005 via Catalogers' Desktop and in print. Revisions of the manuals for the SCCTP Integrating Resources Workshop and Basic Serials Cataloging Workshop have been completed. Files for these materials are being processed by CDS and will be available for purchase shortly.

Spring 2005 issue of CONSERline is available at http://www.loc.gov/acq/conser/consln26.html.

WORKSHOP AND CONFERENCE REPORTS

LAUGHING OR LEARNING?
SCCTP INTEGRATING RESOURCES CATALOGING WORKSHOP, MANOA, HAWAII
Reported by Keiko Okuhara

The Serials Cataloging Cooperative Training Program's (SCCTP) Integrating Resources Cataloging Workshop, was offered on March 23-24, 2005 at the University of Hawaii at Manoa Campus, Hawaii. Due to the devastating Halloween Eve flood on October 30, 2004, the workshop was held at one of the classrooms at the UH Law School instead of the Hamilton Library. It was a nice change, and we felt like we were law students. Two outstanding trainers, Rhonda Lawrence, Head of Cataloging and Bindery, Hugh and Hazel Darling Law Library, UCLA School of Law and Steve Shadle, Serials Access Librarian, University of Washington Libraries gave an informative and instructive presentation and entertained eighteen attendees. The workshop was filled with aloha spirits.

As usual, the day began with presenting a lei to our instructors following Hawaiian custom and tradition. After Rhonda calmed down a little from the excitement of receiving the lei, she started the workshop with discussion on "basic concepts and definitions of different types of issuance" by showing that famous bibliographic landscape image to explain that an integrating resource exists between monographs and serials mountains. The visualization of this concept is always helpful to capture the definition of three different materials. Steve took over the presentation to talk about the nitty-gritty of original cataloging in a step-by-step fashion,

which included a review of new and existing coding and standards. Naturally, we all were happy to know about these new trends, but frankly, we were a little bit apprehensive about the changes, especially, the bibliographic level "I," which has not been implemented by OCLC yet.

Though the workshop got into more details as the day progressed, trainees participated more in the discussions and raised challenging questions. For the afternoon session, thanks to cookies and ice-cold water during the break, our minds remained fresh and our concentration was still clear. We were somewhat relaxed because of Steve's careful instruction. We left the knotty issues for day two so everyone could leave happy even if there was a reading assignment for the next day.

Day two began with a review of the previous sessions. Rhonda discussed copy cataloging, and emphasized that copy cataloging will be even much trickier than original cataloging, since familiarity with updated rules and standards is needed to modify records or to make a judgment not to create a new record. Rhonda steered the discussion on special issues in cataloging updating loose-leaf to keep us moving right along. After lunch, we were a little bit worn down but Rhonda would not let us close our eyes, since she was covering her favorite topic, updating loose-leaf. As the queen of cataloging

updating loose-leaf, Rhonda delivered useful tips. She pointed out that we might have to sometimes relinquish the perfect bibliographic description in order to make effective and efficient modifications to a cataloged record. When updating a record, the cataloger should be well versed with cataloging description and while the perfect bibliographic description is ideal, there is limited time and/or staff to work on it. The cataloger has to face this issue all the time, knowing the complexities of dealing with the history of cataloging rules and standards. Rhonda generously shared her perspective based on her own experiences and training as the manager of a cataloging department. It was extremely helpful information that may guide us in decision-making in our daily work. Of course, Rhonda did not let us go without finishing our assignment so as part of the wrap-up session, she gave us questions from the reading material, LCRI 1.0, which was assigned the previous day. It was quite beneficial for all of us to refresh our fading memories on the benchmark of the decision-making point of cataloging serials, monographs, and integrating resources; the change of the type of issuance; and LC and CONSER practices, etc.

We are very grateful and fortunate to have had this workshop in Hawaii. My special thanks go to Rhonda Lawrence and Steve Shadle for providing an ideal learning setting with exercises to deepen our understanding. We were really engaged in their instructions thanks to their good sense of humor. We were laughing, and at the same time, learning. Also, we are very thankful to OCLC Western and the NASIG Continuing Education Committee for their generous financial support to allow us to hold the workshop in Hawaii for two years in a row. We are also grateful to the Continuing Education Committee co-chairs, Bob Alen and Nathan Rupp for their kind encouragement and support. In addition to this help, the William S. Richardson Law Library and School of Law of the University of Hawaii at Manoa generously extended their support as well. I am hoping this local collaboration at the Manoa campus will become a tradition and continue to invite distinguished trainers to Hawaii. Aloha!

THE E-FILES: INVESTIGATING E-JOURNAL TOOLS AND TRENDS
Reported by Patrick L. Carr

For a fifth year, NASIG's Continuing Education Committee joined with Mississippi State University Libraries and EBSCO Subscription Services to cosponsor an e-journal workshop for information professionals in the Deep South region. Held at Mississippi State University (MSU) on July 8, 2005, this year's workshop, titled "The E-Files: Investigating E-Journal Tools and Trends," explored a number of emerging issues related to the role and management of e-journals in libraries. In attendance were over ninety people from six states in the southeast.

Keynote speaker Rick Anderson, Director of Resource Acquisition at the University of Nevada, Reno Libraries, got the workshop off to a lively start with his presentation "It's Not about the Workflow: Patron-Centered Practices for 21st Century Serialists." In a world where a myriad of digital resources present patrons with an overabundance of information, Anderson argued that libraries must rethink their practices. Attacking a tendency in the profession to disparage or dismiss emerging tools such as Google, Anderson encouraged library administrators to adopt workflows that are in tune with how patrons actually use library resources. With respect to serials management, this means that librarians must question the value of traditional, print-centered practices such as claiming and binding in light of patrons' clear preference for accessing journals online. Cautioning against the ambition of achieving perfection in all practices and compliance with all professional standards, Anderson used humor, personal anecdotes, and his pragmatic philosophy of librarianship in order to inspire the workshop's attendees to think critically about whether their libraries' management of serials effectively meets patrons' changing needs.

The workshop's second speaker, Jill Emery, Director of the Electronic Resources Program at the University of Huston, discussed one emerging tool that librarians can utilize when implementing a shift to the e-journal-oriented workflow advocated by Anderson. In her presentation "Ghosts in the Machine: The Promise of Electronic Resource Management Tools," Emery discussed the potential that ERM tools have to meet libraries' needs for consistent and coordinated processes for the management of their ever-growing electronic resources. In addition, she gave an overview both of the ERM

tools in development from major vendor and of ERM tools that are homegrown. To help determine whether one of these ERM tools is appropriate given a specific library's needs, Emery distributed an evaluation grid to the attendees. Following her presentation, Emery fielded a variety of questions from the audience concerning the impact of and differences between ERM tools.

Oliver Pesch, Chief Strategist of E-Resources at EBSCO Information Services, was the third speaker lined up for the day. His presentation, "E-Journal Services, Tools, and Standards: An Agent's Perspective," addressed the ways in which agents can facilitate libraries' management of e-journal collections. As a basis for his discussion, Pesch made a comparison between the life cycles of print journals and electronic resources that forcefully illustrated the many new and complex tasks that managing electronic resources entails. To help libraries meet these challenges, agents must offer services such as the prompt registration and activation of e-journal orders, the collection and updating of data required by ERM tools, A-to-Z lists of resources, and a variety of channels for customer support. Pesch concluded his presentation by giving an overview of upcoming standards that will impact the future of e-journals.

The workshop's final presentation, titled "Find Articles 2: Using Metasearch to Get Users to Full-Text," was given by David Lindahl, Director of Digital Library Initiatives at the University of Rochester. Lindahl devoted the first half of his presentation to describing the process through which the University of Rochester Libraries developed a user-centered design for its website. He emphasized the essential role played by user research and gave an overview of how groups of information professionals devoted to the website's content, design, and usability applied their respective skills to create a library website that actually meets users' needs. Among the foremost of these needs is to effectively find articles. Research revealed that users have difficulty selecting a subject or a database and are further confused by the array of choices for full-text listed in an OpenURL link resolver. Lindahl then explained how the user-centered design of the University of Rochester's Find Articles 2 interface functions to facilitate the search for articles. He demonstrated how it simplifies search screens, eliminates perplexing and unnecessary choices, and minimizes the number of 'clicks' required to reach an article's full-text.

Based on the positive evaluations submitted by the attendees, this year's e-journal workshop can be deemed a success. While Anderson's presentation inspired the attendees to contemplate the larger, philosophical questions related to the management of e-journals, the presentations of Emery, Pesch, and Lindahl all brought to light specific tools and trends that promise to shape e-journals' future. Although only one attendee was lucky enough to bring home as a door prize an autographed copy of the latest bestseller by MSU alumni John Grisham, all of the attendees left the workshop with increased enthusiasm and valuable clues that may allow them solve the many mysteries that continue to surround the role and management of e-journals in libraries.

DOES FRBR INCLUDE SERIALS?
A FRBR IMPLEMENTATION FOR ALL FORMATS
[Presented at the New England Technical Services Librarians (NETSL) 2005 Spring Meeting,
College of the Holy Cross, Worcester, Massachusetts, April 8, 2005]
Reported by Craig K. Thomas

FRBR seems to be on everyone's minds these days in technical services. Many of us have read the IFLA document[1] and know something about FRBR in theory, but lack a clear conceptualization of how it will work in reality. For New England-area librarians who had missed a demonstration of VTLS's Release 45 of their Virtua ILS at ALA Midwinter 2005 in Boston, today's session with John Espley, Director of Product Design & Consulting, VTLS Inc., was an opportunity to glimpse one vendor's conception of FRBR implementation within the serials environment.

VIRTUA DEMO

Espley opened with a discussion of key "design considerations" VTLS has considered for its product. One was whether to store records as FRBR records or "FRBRize" them on-the-fly.

VTLS decided the former makes more sense in terms of collocation, validation checks, and managing linking relationships within a records family. Another consideration was whether to have a catalog of "pure" FRBR records or a "mixed" catalog with FRBR and traditional MARC records. VTLS opted for a mixed catalog. Espley noted studies at VTLS and OCLC indicating that only 18% of bibliographic records would benefit from FRBRization; the other 82% constitute single occurrences in the catalog without any relationship to other records. Espley also pointed out that Virtua is sufficiently flexible to allow the option of implementing FRBR or ignoring it if desired. To support cataloging—another design consideration—VTLS has created a sleuth of tools (not demonstrated). Espley described a "FRBRize button" that converts a regular MARC record to FRBR with a single click. Automatic linking between work-expression-manifestation-level records is also possible, as is copying an entire family of FRBR records (a "FRBR tree") from one catalog to another. Virtua also allows one to "batch FRBRize" an entire catalog or even "unFRBRize" records if necessary.

Of the design considerations addressed, it was likely the question of display that aroused the greatest interest, many attendees curious as to what FRBR records even look like. Espley demonstrated VTLS's proposed solution to this design challenge using as an example Beethoven's Symphony No. 6. (Today's demo was PowerPoint-based, rather than live). On the top half of the screen, Virtua's split screen interface displays the work-expression-manifestation relationships within a family of records as an expandable tree structure indented according to the entity level. Distinctive icons denoting each level provide added clarity. On the bottom half of the screen appears the record corresponding to the point in the tree one is highlighting. Each record below the work level possesses both a control number (field 001) and an 004 linking field (appropriated from MARC 21 Holdings Field 004, Control Number for Related Bibliographic Record). The latter corresponds to the control number (001) of the record at the preceding level. Manifestations thus link to their respective expressions; expressions link to the work.

The Beethoven example provided a basic illustration of VTLS's approach to the display of FRBR relationships in Virtua. But what about

formats with more complex bibliographic interrelationships such as serials? Espley's remark, that in searching OCLC for a serial example for his Virtua demo, he had rejected his initial candidate, Books in Print, underscored the relevance of this question. With over 200 records in OCLC containing this title, Espley found this serial too unwieldy for use. Instead, he chose Atlantic Monthly, with only eleven bibliographic records in OCLC, comprising print and microform formats and incorporating five title changes between 1857 and 1993. To organize their representations, Espley has drawn upon Frieda Rosenberg's and Diane Hillman's concept of the "super work" (as originally formulated by Rahmatollah Fattahi in 1997).[2] A super work, Espley explained, is an artificial work tying together a family of related works. (In this regard it is similar to a uniform title). In his demo, he selected "Atlantic monthly super work" at the top of the tree structure; on the bottom half of the screen appeared its corresponding record with the note, "A virtual record for the 'family' of works for Atlantic Monthly." Espley called the five varying titles displayed under this super work "sub-works." At the sub-work level appear the "continues" or "continued by" notes linking one title to its preceding or successive incarnation. Expanding a sub-work level node displays the expression-level node, "Language material—English," providing in the corresponding record below frequency information for that sub-work. Expanding the expression-level node displays the manifestation-level nodes corresponding to the print and microform formats. Their records provide manifestation-level-specific information including imprint, physical description, reproduction notes, ISSN's, etc. Fully expanding all the nodes on the tree displays in reverse chronological order all the works, expressions, and manifestations under the Atlantic Monthly super work, including the eleven manifestations derived from the OCLC records.

Hyperlinking to a related family of works is also possible. Espley displayed the manifestation-level record for "Atlantic monthly (Boston : Mass. : 1857)," which indicated the periodical had absorbed two other periodicals—"Galaxy (New York, N.Y. : 1866)" and "Putnam's magazine." Both display in Virtua as hyperlinks. Selecting "Putnam's magazine," connects one to the "Putnam's magazine super work." Selecting "Galaxy (New York, N.Y. : 1866)," however, brings up an ordinary MARC record for this title.

Because *Galaxy* occurs uniquely as a work, FRBRization is unnecessary.

DISCUSSION AND CONCLUSION

The questions posed during and after the Virtua demo were varied and generated a lively discussion about FRBR in general and its relationship to serials. Espley noted his own concerns. He believes, for example, that serial catalogers may have overused linking entry fields (especially, Field 787, Nonspecific Relationship Entry), which can create unwieldy super works families in the FRBR environment—as was the case with *Books in Print*. Or, as one attendee asked: how can you distinguish between "family" links vs. "neighbor" links? Espley also emphasized the need for "clearer, fuller definitions" of works, expressions, and manifestations. The problem of serial title changes underscores this need: does a new form of title equal a new work or a new expression? VTLS's solution, he reiterated, invokes the concept of the "super work." On this topic, he would also like to see clarified the principles for constructing super work titles. MARC tag mappings for FRBRizing MARC records is another concern of his. Espley remarked that, although he had abandoned his own initial mappings in favor of those by Tom Delsey at Library of Congress, he suggested some of these may require reassignment. Related to this is his intriguing idea of treating work- and expression-level records as hybrid authority/bibliographic records. He noted that MARBI would thus have to rethink the concept of authority record by allowing them to contain subject headings fields. Throughout today's session, Espley reiterated the necessity of rules and guidelines to provide solutions to these and other questions by providing codification.

The audience had questions and comments as well. In response to the question whether FRBR applied to journal indexing, Espley provided an example of an analyzed issue of *Brigham Young University Studies*. Beneath the work-level record for the journal itself, the issue (v. 35, no. 1 1995) appears in the tree structure at the expression level (enumeration/chronology); the individual articles appear at the manifestation level (author, title of article, pagination, subject analysis (in LCSH), etc.). (One might alternatively consider these articles (or the issue collectively) to be component works within a larger work; this is a matter for debate and reinforces Espley's call for guidelines). Similarly, someone asked if FRBR could accommodate monographic serial analytics, to which he responded affirmatively, but provided a music analytics example: a single manifestation-level record (a sound recording) linking to separate works-expression-level records for three compositions by Mozart. Though interesting, this was really a different situation; in the case of monographic serial analytics, as with journal indexing analytics above, does one treat analytics as component works within a work, or as separate expressions within a work?

Other concerns expressed included the responsibility for record clean up and the implications for shared cataloging and bibliographic utilities. Espley noted that, although, the records he had taken from OCLC for the *Atlantic Monthly* example had not required clean up prior to FRBRization, another set of records which he had FRBRized had. As for shared cataloging, he remarked that the utilities must still address the challenge FRBR poses. In the meantime, unFRBRization is the current solution; he mentioned a university library in Belgium that does this prior to sending their records to a union catalog. In addition to this library, he noted a public library in Virginia that has already adopted FRBR.

Espley's response to his own question, "Does FRBR Include Serials?," is: "I think it can." Despite the problems addressed today, FRBR, he believes, will improve OPAC displays and help to realize the Paris Principle of collocation. Again, he awaits more rules to refine and guide practice. Time constraints prevented more discussion. It would have been interesting, for example, to observe how FRBR (and Virtua) handle holdings and item records. A comparison of how different ILS systems handle the same serial title in FRBR would also be useful. One hopes that in converting the more theoretical constructs of the IFLA document into the more pragmatic codification represented by AACR3, the Joint Steering Committee for Revision of Anglo-American Cataloguing Rules will derive inspiration from some of the more practical solutions offered by ILS vendors, such as VTLS.

NOTES

1. International Federation of Library Associations and Institutions. *Functional Requirements for Bibliographic Records:*

Final Report (München: Sauer, 1998). http://www.ifla.org/VII/s13/frbr/frbr.pdf (accessed April 27, 2005).

2. Frieda Rosenberg and Diane Hillman, "An Approach to Serials with FRBR in Mind: CONSER Task Force on Universal Holdings," (draft document, last rev. 1/24/04):1, http://www.lib.unc.edu/cat/mfh/serials_approach_frbr.pdf (accessed April 27, 2005).

2005 NORTH CAROLINA SERIALS CONFERENCE
Reported by Dianne Ford

The 14th Annual North Carolina Serials Conference, titled "Serials Services in the Eye of the Information Storm", met in Chapel Hill, North Carolina, on April 14-15, 2005. The conference was once again sponsored by the North Carolina Central University School of Library and Information Sciences, with financial support from NASIG and a number of publishers and universities. Participants represented libraries, publishers, and serials agents from NC, SC, VA, GA, AL, PA, DC, FL, NV, MD, and the UK.

During the two days of meetings, many current hot topics in the serials world were addressed and discussed. These included: open access, digital archiving, print serials, serials cataloging, staffing, license agreements, usage statistics, big deals, quality serials collections, managing electronic resources, and value-added technical services. A summary of some of these topics follows; presentations from the conference can be found on the conference website at http://www.nccuslis.org/conted/serials2005/presentations.htm

Following an opening luncheon, early afternoon was devoted to discussions of open access (OA) issues. T. Scott Plutchak, U. of Alabama, Birmingham, and Rick Anderson, U. of Nevada, Reno, provided a Point-Counterpoint Session. Afterwards, they participated in a panel discussion, joined by James Siedow, a current faculty member at Duke University. A lively exchange included the importance of access to scientific literature, attaching cost to the production of an article rather than to the readership, benefits to authors, prestige issues with OA journals, and the necessity of finding models that keep publishers solvent. Detailed comments from most of these participants are available at the conference website.

Round Table discussions and reports filled the rest of the afternoon. Attendees could chose from topics including Digital Archiving, Serials Issues in Small Libraries, Print Serials, Serials Cataloging, Staffing Restructuring, License Agreements, and Usage Statistics. This reporter attended a discussion of license agreements, which focused on issues we look for in our contracts (ability to use Ariel for ILL, ADA compliance, walk-in users, guarantees with prorated refunds, etc) and examples of good contract guidelines (see UNC-Charlotte's at http://www.legal.uncc.edu/contract.html) It was also recommended that librarians attend the ARL Contracts Workshop (http://www.arl.org/training/licensing.html)

Friday morning kicked off with another Point-Counterpoint between Nancy Gibbs, Duke University, and Tim Bucknall, UNC-Greensboro, on "Walking Away from the Big Deal (Or Not)". Gibbs presented the reasons for TRLN's (Triangle Research Library Network) decisions to cancel several journal packages for 2004; Bucknall, fearless leader of the new Carolina Consortium, presented the many benefits of negotiating big deals with publishers. Their presentations are available in detail on the conference website.

Conference attendees attended concurrent sessions before and after lunch on Friday, so could choose two of five topics offered. Sessions were: "Can Agents Really Deliver on Their Digital Promises?" (Rebecca Day, EBSCO, and Robert Boissy, Springer); "Building Quality Serials Collections: What's Their Secret" (Yvette Diven, Bowker); "Electronic Resources Management" (Andrew Pace, NCSU); "Beyond FRBR (Functional Requirements for Bibliographic Records): Identifying a Serials Work in the Digital Age" (Frieda Rosenberg, UNC-Chapel Hill); and "Making It Our Own: Creating a Customized Product from an "Out-of-the-Box" Link Resolver Software Package" (Linda Kubala and Kristine Mudrick, St. Joseph's University) This reporter attended Rosenberg's presentation on FRBR, which included why our catalogs fail, the conceptual model of FRBR, and upcoming changes to AACR3. Diven's session on quality serials collections included discussion of how we evaluate: standards such

as Magazines for Libraries, core lists, accreditation board lists; by the numbers, looking at citations or usage; and home-grown measures, including ILL requests, formats, and dust factors.

Rosanne Bazirjian, library director at UNC-Greensboro and 2005 president of ALCTS, presented the closing keynote address on "Value-added Technical Services: Managing the Challenges of Today and Tomorrow". Bazirjian reviewed the impact the "value added" business model has had on libraries, and suggested that within technical services, "value added" might include additional education and training, additional workloads, IT challenges, added costs, and added opportunities.

Conference wrap-up was provided by Selden Lamoureux, UNC-Chapel Hill, and Eleanor Cook, Appalachian State University. They summarized that print serials are alive and well, e-content is maturing, and our serials departments are facing restructuring to handle changing tasks. The dates for the 2006 NC Serials Conference will be March 30-31 at the Friday Center in Chapel Hill, NC.

E-JOURNAL ARCHIVING: WHO IS RESPONSIBLE?
Reported by Sue Neilson

The Potomac Technical Processing Librarians (PTPL) celebrated its 80th anniversary on October 14-15, 2004, with a conference and pre-conference held at the University of Virginia in Charlottesville, VA. NASIG partnered with PTPL to present the pre-conference, "E-Journal Archiving: Who is Responsible?" It was the first time PTPL offered a pre-conference in conjunction with its annual fall meeting. About 45 PTPL and NASIG members attended the pre-conference. Beth Weston, Past Chair of PTPL, opened the half-day session and introduced the speakers who represented commercial, nonprofit, and government electronic archiving interests.

The first speaker of the afternoon, Victoria Reich, is the Director of LOCKSS (Lots Of Copies Keep Stuff Safe). Her presentation, "The LOCKSS Program: Keeping Library Collections Alive," described the preservation and access initiative that went live in April 2004. LOCKSS gives libraries and librarians some direct responsibility in providing continuing access to electronic journals, newspapers, and government documents. Currently about 80 publishers and 100 libraries worldwide participate. With the publishers' permission, LOCKSS computer software in each library enables a crawler to collect and cache content from journal publishers' websites. The LOCKSS computers then collectively share, compare, repair (if necessary), and preserve the gathered information against a time when a publisher's website may not be available. Publishers are relieved of the burden of preserving their intellectual content, while libraries build, preserve, and deliver their own electronic collections for future generations. While LOCKSS does not solve all digital preservation problems, Ms. Reich believes that the risk of doing nothing is far greater than any risk in moving forward with the LOCKSS program.

Carol MacAdam, JSTOR's Associate Director for Library Relations, followed with her presentation, "The JSTOR/E-Archiving Continuum" about JSTOR's initiatives to benefit libraries, publishers, and scholars by digitizing and preserving scholarly core journals, mostly in the social sciences and humanities. JSTOR's objective is to be a long-term, full-text archive of journal literature, providing round-the-clock, full-text access through its electronic collections. At present JSTOR provides access to over 440 journals in eleven collections with over 16 million pages of archived content. Realizing that commercial archiving efforts will need to be supplemented by additional not-for-profit organization initiatives, JSTOR, in collaboration with three foundations, founded Ithaka. Ithaka's mission is to foster the creation and success of not-for-profit organizations in their use of new technologies for higher education. JSTOR, Ithaka, and the Mellon foundation jointly support the Electronic Archiving Initiative to preserve scholarly literature published in electronic format and to ensure its availability for future use. The E-Archive is working to achieve a sustainable archiving program through ensuring adequate funding, cooperative information sharing and arrangements with libraries and publishers, and completing work on a production-level archival repository.

James Hodson, digital conversion specialist from the Library of Congress's Preservation Reformation Division, described the American Memory program and issues surrounding digital preservation in his talk, "Building and Evolving Digital Collections for American Memory." He first focused on background issues such as access vs. preservation, economic feasibility of preservation, selection for digitization when you cannot preserve everything, standards, metadata, and technical concerns. The American Memory collections include historic still and moving images, sound recordings, documents, cartoons, pamphlets, maps, etc. The program began as a pilot project of analog data on videodisc and grew quickly into an online digital collection. The rapid growth depended heavily on establishing consistent, patterned practices for various aspects of the work including those for file formats and storage, descriptive metadata, and presentation. Early evaluations concluded that secondary schools were a primary audience and that visual materials were mostly highly desired for primary research. Under the National Digital Information Infrastructure and Preservation Program (NDIIPP) that encourages digital preservation strategy and partnerships, LC is also undertaking other digitization projects under Open Archives Information System (OAIS) model. These include digitization of e-journals, brittle books, 19th century periodicals, and 19th and 20th century newspapers. Hodson's presentation was peppered with striking examples of digitized historic images. He concluded with his belief that while the OAIS model serves them well, challenges remain in content management, cooperation, technical, and legal areas.

Brooke Dine, National Library of Medicine, described PubMed Central (PMC), a digital archive providing free access to full-text articles in life sciences journals. To be included in PMC, journals must be abstracted or indexed by a major service or have three editorial board members with current grants from major non-profit funding agencies. Since January 2000, publishers provide PMC with full-text XML and graphics but retain copyright. The publisher may delay free access to content and may stop depositing new materials at any time but may not withdraw material already submitted. In addition, PMC also seeks to digitize retrospective issues of journals in its current program and other prestigious journals with long

histories. PubMed Central archives an authoritative copy in XML and for additional security, distributes the content to other archiving organizations; XML is used because it preserves the structure of an article and is readily searchable. NLM believes readers provide quality control and ensure quality of the source materials, which in turn ensures preservation.

The final speaker of the day was Robert Boissy, Springer Kluwer's Licensing Manager, Library Relations, who presented his vision and rationale for local electronic journal archiving. He believes this model is a mirror of past practice--publishers sell intellectual content, and libraries buy and own journals, regardless of format. Boissy believes the publisher benefits when local backups are permitted. Chances of complaints and claims for loss of access due to technical failure are lessened and commercial/academic cooperation is enhanced. In May 2003 Kluwer agreed to provide all its electronic journal and book content to the National Library of the Netherlands to be archived. Thus Kluwer provided long-term preservation and perpetual access to its digital information. Besides enabling on-site access at the National Library, the system also allows for interim service should disaster befall Kluwer's server. This environment provides online stability for libraries. It provides some economic stability for e-journal publishers which should enable them to slow or lower inflation rates on subscriptions and support some free public access. Currently Springer is digitizing all Springer and Kluwer journals back to the first issue. Springer Kluwer believes this is a valuable investment. Libraries have the option to back up and keep smaller subsets of its intellectual content rather than manage a comprehensive archive; this creates some autonomy and helps to spread the responsibilities of archive management. As consortia play an increasing role, publishers are concerned about access administration. Publishers see local archiving as a method to preserve electronic content, not as a means to share it with the public while publishers' servers and services are operational.

The PTPL Advisory Council received many positive comments about this e-archiving program and extends thanks to NASIG for its support that helped to make the pre-conference possible. The audience and speakers alike

displayed enthusiastic interest in the issues and in learning from one another. The same spirit infused the next day's anniversary celebration and annual conference, "Serving and Preserving Digital Collections." The presentations from both days can be found on PTPL's website: http://www.lib.virginia.edu/ptpl/2004preconf.html.

TITLE CHANGES

[Note: Please report promotions, awards, new degrees, new positions, and other significant professional milestones. You may submit items about yourself or other members to Susan Andrews (Susan_Andrews@tamu-commerce.edu). Contributions on behalf of fellow members will be cleared with the person mentioned in the news item before they are printed. Please include your e-mail address or phone number.]

MICHAEL L. BRADFORD is the new Serials & Electronic Resources Librarian at the Andover-Harvard Theological Library of the Harvard Divinity School in Cambridge, Massachusetts effective June 1, 2005. He was formerly the Supervisor of Serials Cataloging at the University of Notre Dame from November 2002-May 2005 and a Serials Copy Cataloger at the Indiana University Bloomington Main Library from March 2000-October 2002. He completed his MLS from Indiana University Purdue University Indianapolis in June 2004. His new contact information is:

> Andover-Harvard Theological Library
> Harvard Divinity School
> 45 Francis Avenue
> Cambridge, Massachusetts 02138
> Phone: (617) 384-7826
> Fax: (617) 496-4111
> E-Mail: michael_bradford@harvard.edu
> Or you can read his blog entitled "The Library Despot" at:
> http://librarydespot.weblogs

At Monroe County Community College, **JENNIFER CARMODY**'s title has changed from Public Services Librarian to Information Services Librarian. Her contact information is unchanged.

SUSAN DAVIS emailed this information to let her NASIG colleagues know **"CINDY HEPFER**, formerly Head of Collection Management Services at the Health Sciences Library, University at Buffalo, State University of New York (UB), and Susan Davis, formerly Head of Periodicals in Central Technical Services at UB, have become co-heads of a newly formed, centralized Electronic Periodicals Management Department (EPMD) within the University Libraries. EPMD is comprised of 3.25 librarians and 3 high level paraprofessional staff. The group has responsibility for license negotiation, monitoring pricing models, ordering, activating, cataloging, and regularly checking and updating holdings and access information for electronic periodicals in the local catalog and the Serials Solutions list. EPMD also handles a great deal of problem solving for the university's numerous e-journals. It is in the process of implementing the Innovative Interfaces Inc. Electronic Resources Management module to expedite control over e-journals and other electronic resources subscribed to or purchased by the UB Libraries. Now in addition to rooming together at conferences, we sit right across from each other!" Susan's phone numbers and e-mail address remain the same and Cindy's e-mail is also unchanged. New addresses and phone information are:

> University at Buffalo,
> State University of New York
> Central Technical Services,
> Acquisitions Department
> Lockwood Library Building
> Buffalo, New York 14260-2200
> Phone: (716) 645-2784
> Fax: (716) 645-5955

The new Director of the Association of Research Library's Office of Scholarly Communication (OSC), **KARLA HAHN** began her job full-time effective May 25, 2005. She was previously the Collection Management Team Leader for the University of Maryland Libraries. "The Director of OSC is instrumental in creatively defining and advancing the portfolio for ARL's scholarly communication program. This program will be shaped by the new ARL Strategic Plan that calls for ARL to give priority to being a leader in the development of models of scholarly communication that provide barrier-free access to quality information in support of teaching,

learning, research, and service to the community." Karla can now be reached at:

Office of Scholarly Communications
Association of Research Libraries
21 Dupont Circle
Washington, DC 20036
Phone: (202) 296-2296
Fax: (202) 872-0884
E-mail: karla@arl.org

In the March 2005 *Newsletter,* **JAY HARRIS**' title change was announced, but his library's name was not included. Jay is currently at the Lister Hill Library of the Health Sciences at the University of Alabama at Birmingham.

Moving from one end of the United States to another, **MARLENE A. HARRIS**, formerly the Head of Technical Services at the University of Alaska, Anchorage is, as of June 3, Head of Acquisitions Services and Serials Control at the Florida State University Libraries. She had this to say about her change "As far as what the change in jobs has meant, it has meant quite a lot. Some of the obvious, that the difference between a hot day in Tallahassee being 98+ and a hot day in Anchorage being 78, just barely. And I have switched from being a Cataloger with some responsibility for Serials to an Acquisitions librarian with some responsibility for Serials. So the shift in focus in my position has been a major change. Also, FSU is either 3, 4, or 6 times the size of UAA, depending on which set of statistics you happen to be looking at. But I'm having a blast!" Marlene's new addresses are:

Florida State University Libraries
Technical Services
711 W Madison Street
Tallahassee, Florida 32306
Phone: ((850) 644-0468
E-mail: mharris3@mailer.fsu.edu

Muhlenberg College's new Serials Librarian, **PENNY LOCHNER** e-mailed "I started at Muhlenberg as the Serials Librarian in June 2004. As Serials Librarian, I have primary responsibility for cataloging, purchasing, and processing of print, microform and electronic periodicals. I also work jointly with the reference librarians on periodical collection development. After working at my previous job in a behind-the-scenes role for the serials vendor, Wolper Subscription Services, it's been great to move back into a role where I can directly serve

patrons. I love finding ways to make complex data work better and dealing with challenging access issues. To top it off, I have the good fortune to work with colleagues who are equally service-oriented." Penny was previously employed as Wolper Subscription Services' Director, Public Relations. Her current contact information is:

Trexler Library
Muhlenberg College
2400 West Chew Street
Allentown, Pennsylvania 18104-5564
Phone: (484) 664-3561
Fax: (484) 664-3511
E-mail: plochner@muhlenberg.edu

EMILY McELROY moved from Eugene, Oregon, and her former job as Collection Development & Acquisitions Librarian at the University of Oregon Library, at the end of March 2005, to begin her new job at New York University's Bobst Library as Head of Acquisitions. She may now be reached at:

Bobst Library
New York University
70 Washington Square South
New York, New York 10012
Phone: (212) 998-2480
Fax: (212) 995-4366 (Fax)
E-mail: emily.mcelroy@nyu.edu

Although **DIANNE NICHOLSON**'s title change at the University of Regina appeared in the March 2005 *Newsletter,* her paragraph did not make the earlier than usual deadline, and she wanted her NASIG colleagues to know this about her new job "Under our new University Librarian, a review of all Library services and staff positions was undertaken. Some reorganization of departments occurred and a new department Collection Development was created reporting directly to the Associate Librarian, Research. I began my position as Manager, Collection Development, March 2004. This change consolidates, coordinates and provides support to the Reference and Instruction librarians in their collection responsibilities. It also reflects a change, moving from one half time person to a full time Manager and increasing support to all library users, faculty and students as the library moves towards defining what the collection should contain. One of the primary roles is to ensure that a broader interdisciplinary approach is kept in mind when adding materials to the

collection or when materials are removed from the collection. During the summer 2004 a new model for the unit was drafted, presentations were given to staff, and staffing levels for the unit were identified. Formal review of New Course proposals began and collection implications were identified. A regular review of research projects around campus was begun. At the same time, over the summer, we merged our Education/Fine Arts Library with the main library. We now have one sequence of materials for the circulating collection and one sequence for serials. Previously we held many separate sequences for tiny collections. This has made it easier for both faculty and students to use the library."

Formerly the Serials Coordinator at the University of North Carolina at Wilmington's Randall Library, **LYNN SHAY** began her new job as Head of Serials at the University of West Florida on July 1, 2004. She felt she was a little late reporting the change, but it was entirely understandable when she wrote "Shortly after getting settled in my new job and home, Pensacola was hit by Hurricane Ivan. I had tree damage but that was minor compared to the rest of the area. The library was undamaged but damage to the university caused it to be closed for over three weeks. Actually it has been fun year for serials at UWF, on top of all this we changed our ILS to Ex Libris Aleph twelve days after I began my job! Good thing I like to be challenged." Lynn's updated contact information is:

University of West Florida
11000 University Parkway
Pensacola, Florida 32514
Phone: (850) 474-2460
Fax: (850) 857-6166
E-mail: lshay@uwf.edu

CALENDAR

September 29-October 2, 2005
LITA National Forum
San Jose, California
http://www.ala.org/ala/lita/litaevents/litanationalforum2005sanjoseca/2005Forum.htm

October 17-November 11, 2005
Association for Library Collections & Technical Services (ALCTS)
Fundamentals of Acquisitions Web Course
http://www.ala.org/ala/alcts/alctsconted/alctsceevents/webcourses/alctsfundamentals.htm

October 28, 2005
Potomac Technical Processing Librarians
Annual Meeting
Annapolis, Maryland
http://www.lib.virginia.edu/ptpl/

October 28-November 2, 2005
American Society for Information Science & Technology (ASIS&T)
Annual Meeting
"Sparking Synergies: Bringing Research & Practice Together"
Charlotte, North Carolina
http://www.asis.org/Conferences/AM05/index.html

October 29-30, 2005
NASIG
Executive Board Meeting
Denver, Colorado

November 2-5, 2005
Charleston Conference Issues in Book and Serial Acquisitions
25th Annual Conference
Charleston, South Carolina
http://www.katina.info/conference/

January 19, 2006
NASIG
Executive Board Meeting
San Antonio, Texas

January 20-25, 2006
American Library Association (ALA)
Midwinter Meeting
San Antonia, Texas
http://www.ala.org/ala/eventsandconferencesb/midwinter/2006/home.htm

March 20-25, 2006
Public Library Association (PLA)
11th National Conference
Boston, Massachusetts
http://www.eshow2000.com/pla/

May 4-7, 2006
NASIG
21ST Annual Conference
"Mile High Views: Surveying the Serials Vista"
Denver, Colorado
http://www.nasig.org/public/2006proposals.html

May 19-24, 2006
Medical Library Association (MLA)
Annual Meeting
Phoenix, Arizona
http://www.mlanet.org/am/am2006/index.html

June 11-14, 2006
Special Library Association (SLA)
Annual Conference
Baltimore, Maryland
http://www.sla.org/content/Events/conference/ac2006/index.cfm

June 22-28, 2006
American Library Association (ALA)
Annual Conference
New Orleans, Louisiana

See also the *American Libraries* "Datebook."

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In 2005, the *Newsletter* is published in March, May, September, and December and a special issue in July. Submission deadlines for the regular issues (February 1, April 1, August 1, and November 1) are 4 weeks prior to the publication date. The submission deadline for the next issue is:

NOVEMBER 1, 2005
NO LATE SUBMISSIONS WILL BE ACCEPTED