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President's Corner

Joyce Tenney, NASIG President

Hope everyone is having a great summer! It has already been a busy season for NASIG. As the executive board gears up for our yearly adventures, just a reminder to feel free to contact us with ideas, comments, and concerns.

Special thanks to the 2013 Conference Planning Committee and 2013 Program Planning Committee for an excellent conference. The Program Planning Committee (under the leadership of Karen Davidson and Kelli Getz) gave us many excellent programs. Preconferences offered several great options, from cataloging to publishing to copyright. Vision Speakers (Bryan Alexander, Megan Oakleaf and Siva Vaidhyanathan) offered excellent thought provoking ideas, and the many breakout sessions were packed with information and great discussions.   The Great Ideas Showcase was new this year and I think many found it a good way to get a taste of projects and technologies in our community. The NASIG Newsletter will supply reports on the various conference programs. It offers information on the programs you might have missed. For those unlucky souls who were unable to attend the conference this year, you will be able to catch up on some of the great programs. (But not Zombie Baseball!)

The Conference Planning Committee (under the leadership of Susan Davis and Cindy Hepfer) offered wonderful special events and graciously welcomed us to Buffalo. Whether it was the Conference Opening Receptions, Zombie Night at the ballpark, or the fun

times at the Transportation Museum, CPC kept the conference logistics on target, and kept us well fed and entertained. Both of these committees worked long hours and wrestled with many issues to pull off a great conference. Please join me in offering a cheer for them. Finally, special thanks to our Sponsors and Vendor Expo participants. Their support and participation is an invaluable part of the conference.

Our current NASIG committees are hard at work. Here is a sampling of highlights of ongoing activities.

The Electronic Communications Committee has had their nose to the grindstone working on a major upgrade to the NASIG website and the administrative functions attached to the website. This is a time consuming and meticulous task. Many thanks to them for their efforts. The new website will offer much cleaner view and there will be many other improvements.

The Conference Planning Committee (under the leadership of Janice Lindquist and Michael Hanson) and Program Planning Committee (under the leadership of Kelli Getz and Anna Creech) are hard at work on planning the 2014 NASIG Annual Conference in Fort Worth, Texas, on May 1-4, 2014. The theme for the 2014 annual conference is "Taking Stock and Taming New Frontiers". The conference will take place at the Hilton Fort Worth right in downtown Fort Worth. Information will be posted on the NASIG website after the upgrade to the website is completed.

Program Planning will be issuing one call for proposals this year from October1, 2013-November 15, 2013. Please consider submitting a proposal! If you have

suggestions for presenters, please contact Program Planning.

The Executive Board has approved the final draft of the Core Competencies for Electronic Resources Librarians. Many thanks to the Core Competencies Task Force for all of the hard work on this important document.   More about this later in the *Newsletter*.

The contract for our 2015 conference hotel is in the final stages. An announcement should be coming out soon about the location. We will have a great 30th Anniversary.   (I think you will be really excited about this location and special programming!)

Continuing Education is busily planning webinars to keep us in the know for the coming year. Please send suggestions for topics and speakers to them.

The Student Outreach Committee will be surveying library and information school students for ideas and information, and the Financial Development Committee is researching the possibilities of streaming sessions from the annual conference. Membership Development will be polling members unable to attend to the annual conference to gain ideas on making the annual conference even more valuable to our members.

As you can see, we are having a very active summer and on target for having a productive year. Thanks to all our volunteers who are hard at work for NASIG. NASIG is an amazing organization!

As we head toward our 30th Anniversary, I think we can safely say that NASIG is alive and well, and moving full steam ahead.

Please Donate to NASIG
Convenient webform located at:
http://www.nasig.org/make_a_donation

Essay for the 2013 NASIG Horizon Award

Shannon Regan

The Librarian as Designer: Creating Blueprints for Information Architecture

As I focused on writing this essay about the 2013 NASIG Conference theme, "The Art of Information/The Architecture of Knowledge," I found myself snapping a picture of a draft workflow proposal I was working on and posting it to the photograph sharing application, Instagram. Instagram is popular with users for its ability to render artistic, professional looking photographs out of ubiquitous cell phone pictures. A new serials acquisitions workflow is not your average "instagrammable" subject. I discovered beauty in the art of information and the architecture of knowledge in the way the workflow simply, accurately, and effectively represented the blueprint of serials acquisitions in an academic library and felt compelled to share it. Art remains innately subjective, yet it is not hard to see artfulness in how I endeavor to collect, license, distribute, and preserve serials and other electronic resources for our library stakeholders. The foundation of libraries will always be built upon its strength of collections, but in the new information architecture being designed today, electronic resources are the cornerstone of their construction. By becoming an invested member in the larger information community through organizations, including NASIG, I strive to help influence how all the major players (or pieces) come together to create a masterpiece in the construction of information and the dissemination of knowledge.

I see the library not only as a brick and mortar building, which provides access to and houses a collection of materials to support scholarly objectives, but a hub for information creation and sharing. The library provides the building blocks, the foundations, to scholarship and education. As students, faculty, and scholars seek out the library for information to influence their research, I have the ability to significantly influence their successes. My role in the information community is to help ensure that the library customers have access, and continue to have access to the materials they need in order to reach their goals.

The basic blueprint for how knowledge is acquired and consequently shared within an academic institution is drawn upon by many different stakeholders. The foundation of knowledge in academe is information already accessible to its stakeholders. When scholars seek out a solution or explanation, they use information already manifested and created by previous scholars to influence their findings or rationalizations. Librarians play a significant role in cultivating and building a vast collection of these building blocks to foster the art of knowledge and understanding. I believe the technical services librarian is an important stakeholder in this process. I can shape the construction of knowledge by creating a clear blueprint for how information is collected, displayed, and preserved for future generations. After all, no work of art may be enjoyed if it is kept behind closed doors. Specifically, librarians have the ability to influence these factors in relation to electronic access to information through the licensing process. As a technical services librarian with such licensing responsibilities, I can directly influence the architecture of knowledge by lobbying for meaningful, useful, and non-restrictive sharing of information for my stakeholders.

As scholars seek to share their findings with the information community, publishers and vendors play an intricate role in the construction of knowledge. The scholar-to-publisher-to-librarian relationships are crucial in making sure the foundation of knowledge is solid. These relationships must be grounded in the expectation that the sharing of any scholar's knowledge will be influential in the art of understanding. This blueprint sounds so easy to follow, but as I have found early on in this profession, there are constant setbacks, changes in plan, and renovations that take place throughout the process. Knowledge cannot be built in one day, and a serials professional must be equipped to

manage all of the transformations that take place while the work is in progress.

As these stakeholders weave together an intricate web of knowledge, their research builds upon their predecessors' research in a way that continually influences the art of understanding. The "Aha!" moment is forever changing how information is created and consumed.

Through participation in communities such as NASIG, I aim to influence the knowledge and understanding of how my profession succeeds in building a network of access to all the tools that individuals may need to experience their "Aha!" moment. By communicating with other serials professionals, vendors, and publishers, I can create a strong foundation within my career. Through participation in NASIG, I will be more

successful in helping create a community of learning and knowledge. Conversely, I hope to influence other individuals as they endeavor to build upon their foundations.

I have liberally and literally used the idea of serials work as being an artistic blueprint for the creation of knowledge as the foundation of understanding. This metaphor allows me to articulate my goals as a serials professional, striving to grow as a scholar through the interaction with other such professionals. Through this growth, I am confident I will gain insight into how to better tackle the pursuit of knowledge. These experiences will give me the tools to be a knowledgeable information architect for my library and its stakeholders, and my responsibility as a representative of the library as a pillar within the larger information community will deepen.

Interview with Anjana Bhatt, the 2013 Merriman Award Winner

Please start by describing your current position and how you've been involved with serials?

I work as an electronic resources librarian at Florida Gulf Coast University. I manage more than 100,000 online journals through Serials Solutions and work with print journals as well. I work with my assistant, and together we are responsible for getting the quotes for journals, comparing the cost from various vendors, subscribing and renewing online and print journals through our agent, extracting usage data, negotiating licenses, and setting up electronic access to the journals.

What initially led you to NASIG and why do you continue to stay involved?

I had heard about this group and their expertise in matters related to journal management. I have attended a NASIG conference in 2009 at Ashville, North Carolina. Although I was unable to attend subsequent conferences, I did keep a track of what is being presented at every NASIG or UKSG conference. I have stayed involved because these two conferences provide

a perfect forum where a serials or an e-resources librarian can hope to hear about international initiatives and learn from proven solutions and research-based, practical tips that library practitioners present. Later, I applied for the position of NASIG conference planning coordinator as well (did not get selected) as I wanted to get involved with the group and the conference organization.

What prompted you to apply for the Merriman award?

I work for the Florida State University system and I was aware that two of our librarians from University of North Florida and Florida International University have already won this award. I had a talk with them about their amazing experience and I was determined to apply for this award. I have attended several conferences in Asia and here in US. The possibility of learning new things about serials management and experience the European perspective on these issues was too tempting a chance to let go.

How did you react when you found out that you were the recipient?

I literally jumped with joy and could not believe my good luck. I had an inclination that I was going to win the award because I had put in my 100 percent in the competitive essay so I was very happy to learn that my gut sense proved correct.

What were your first impressions of the UKSG conference?

I liked the idea of a small conference. It was encouraging to see that it was possible to network and attend the conference without running around too much in the cold weather and rain. I had gone through the schedule and I liked the types of presentations that were scheduled. Also, I was very encouraged to see a healthy mix of publishers and librarians in the audience. Several publishers and exhibitors not only attended the sessions and social events during the conference, they also presented a few sessions and welcomed the opportunity of a healthy dialog.

While I certainly appreciated the fact that all the sessions were provided at a single venue, I especially noticed and liked the conscious efforts the conference organizers made to protect the environment and provide healthy food at each and every dining event. They provided regular lunches (very small portions not like huge portions in US) in small bamboo plates along with wooden spoons/forks and our TO GO lunches on the last day of the conference were provided in a very cute jute bag. They even collected back the plastic name tags for use at future conferences! I was happy to see no plastic waste.

How do you think the experience of attending the UKSG will affect your career?

Winning this award is definitely an achievement and a great addition to my resume. At this time I am not looking for any jobs but having this award in my kitty definitely improves my job prospects. I was able to learn new stuff and for me, sharing this information

with my colleagues was a great accomplishment. I have also written a report on this conference that might be published in the journal, *Electronic Resources Librarianship*.

How was the UKSG conference different from the NASIG conferences that you've attended?

Other than meeting European professionals I did not find much difference. The quality of papers and topics was pretty much on the same lines. NASIG conference people also have as much fun at the conference and provide ample food, so it was all great.

What was your favorite USKG session and why was it your favorite?

My favorite presentation was: The Student-Information Relationship: a Perspective of its Evolution by Joshua James Harding (Warwick Medical School).
Joshua is a second year post graduate medical student. While listening to his brilliant presentation, I was amazed at the paperless world that he has created for himself. His normal studies and research day is full of technical gadgets. He uses several e-products or apps that help him study, research, access full text content, take notes, download e-book chapters to his iPad, use GoodReader for adding annotations, save his work on Dropbox and records (voice and video) his lectures.

He believes that an e-book "should study him while he studies it". His idea of a smart and interactive text e-book is that it would study with him, inform him about his progress, adapt the content of the book by adding what he needs, be a personal study buddy, compare him with his peers, remind him to learn a technique, provide a true personal learning environment, alert him to the areas that he needs to learn more efficiently and finally, tests his knowledge as well.

He believes that a digital environment savvy student's workflow should allow him to purchase an interactive text e-book from a universal store and view it on a universal platform. He should also be able to use it to export content in PDF format to his notes applications

and be able to apply learning analytics skills for his scholarly efforts.

Are there any barriers to this dream workflow? What can be done to remove them? According to Joshua, future digital-literate librarians, publishers who provide free or low cost text e-books with print orders, and institutional subscriptions to learning and research apps are the answers.

In my opinion, this was a star presentation from which the librarians and product developers can learn a lot about the future digital students and "on demand" information seeking behavior. I have observed that his presentation is currently being discussed on several library blogs. It has been viewed 1329 times on YouTube, and I urge you to view it at your earliest convenience. I strongly believe that to keep pace with digital students, academic libraries will start subscribing to learning apps instead of conventional subscription to e-resources and e-journal packages.

Presentation video is available at http://www.youtube.com/watch?v=j-QmslBH7NY and the slides are available at http://www.slideshare.net/UKSG/0930-harding

What are the differences between the two organizations, USKG and NASIG?

In my opinion UKSG is heavily involved in developing standards for serials management, while NASIG essentially is a group of people who are involved with Serials management and emerging technologies for better management of serials.

For those who might be interested in going to UKSG and perhaps applying for the Merriman award, what advice would you give them?

Do not hesitate….submit your application….it is well worth your effort. Attending a UKSG conference opens up a completely new direction in your professional life.

Is there anything else you'd like to share with us about your experience as a Merriman award winner?

Yes. Here are some of my observations about this conference:

Conference organizers truly believe in their open access endeavors. UKSG members paid a hefty registration fee of 550 British pounds. Non-members paid around 700 British pounds. What pleasantly surprised me was that within 24 hours after a talk was presented, it was uploaded online and available to all. As of now, free access to several presentations and videos is available on the following web sites:

Presentations slides:
http://www.slideshare.net/UKSG/presentations
Videos:
http://www.youtube.com/user/UKSGLIVE?feature=watch

UKSG conference organizers really plan well. Soon after the 2013 conference got over, a call for suggested topics for plenary sessions, breakout sessions, and lightning talks for the 2014 annual conference at Harrogate went up at
http://www.uksg.org/event/conference14.
UKSG conference bloggers were equally active and writing their posts simultaneously on their blogs and tweeting about it.

A Year of Techniques for Electronic Resource Management: The Work of the Marcia Tuttle Award Winner for 2012

Jill Emery & Graham Stone

TERMS (Techniques for Electronic Resource Management) began in 2008 by Jill Emery and Graham

Stone as a joint project to depict the best practices of electronic resource management from the U.S.A. and

UK perspectives. Initially, we spent time developing the concept of TERMS and determining the areas of focus. Starting in 2011, Graham and Jill started the next phase of crowdsourcing the best practices for each segment of the electronic resources lifecycle as defined by Oliver Pesch, Chief Strategist for EBSCO Information Services. Our crowdsourcing was done via Tumblr, Twitter, and Facebook and was opened up to the world for input on management techniques and workflows. To date, we have 48 followers on Tumblr, 171 followers on Twitter and 208 members to our Facebook page. Initially, we posted each segment as conceived and asked for feedback from our followers. In this regard, we consider TERMS to be very successful as we received many valuable comments and workflows from various members of the community. Following the international feedback we received, we started a wiki to present a more cohesive version of TERMS as well as to provide a platform for the sharing of workflows:
http://library.hud.ac.uk/wikiterms/Main_Page
Following the establishment of the wiki and just prior to our publication, we named section editors to each of the TERMS sections for the wiki and this group is made up of three people from the U.S.A. and three people from the UK and Ireland. In February/March, 2013, we published *Techniques for Electronic Resource Management* as Vol.49 #2 of *Library Technology Reports.* All of our open access presentations on TERMS can be found on the University of Huddersfield Repository site here: http://alturl.com/uceqy.

After being awarded the Marcia Tuttle International Award in the summer of 2012, we chose to use the financial support to bring TERMS to three conference events in 2013: Electronic Resources & Libraries (ER&L), UKSG, and ALA Annual as a Pre-Conference. At the Electronic Resources & Libraries Annual Conference in Austin, TX, Jill Emery presented the outcomes from our year-long crowdsourcing and some of the aspects we learned along the way. The presentation was given to around 100 attendees at the conference and has had forty-eight views on SlideShare™. Here is the link to the SlideShare™:
http://www.slideshare.net/jillemery/developing-terms
Following close on the heels of the ER&L presentation,

Jill Emery and Graham Stone also did two presentations at UKSG to around 200 attendees. These sessions were very well received by the attendees and provided us with some good feedback for edits to the wiki as well as the receipt of additional workflows. Our last presentation this year was a preconference on TERMS for ALCTS at the ALA Annual Conference. We had twenty-eight participants in a day-long session to work through each TERMS segment and consider how workflow could be drafted based on each section. Simple workflow assignments were given based around e-journals, e-books, databases, and e-service platforms with groups varying in size from three participants up to about six. Overall the preconference was well rated by the attendees and the take-away of having a copy of the *Library Technology Report* to refer back to was appreciated.

Graham and I have both received extremely positive feedback from the electronic resources community as a whole throughout this endeavor. Librarians from as far away as India and Brazil have shown keen interest in the project and have given us reason to believe that this project has been truly international in scope and impact. We have had a series of conversations with library professionals in India about how TERMS could be adapted for their needs; we have also had an enquiry from the American Association of Law Librarians about presenting at their 2014 conference. This is a direct result of the ALA pre-conference and we are very pleased to have interest from special libraries. A future goal is to propose an IFLA presentation on TERMS for 2014 from the feedback that we've received from the international community.

Our one disappointment is the lack of integration of TERMS by NASIG into the NASIG Core Competencies for Electronic Resources Librarians or even reference to the TERMS within this document. That said, it appears that TERMS is achieving what the funding from the Marcia Tuttle award is intended to do, have an international impact and for that we are ever grateful to NASIG for making TERMS an internationally shared idea and exchange of practice.

Upcoming Conference News

CPC Update:
Taking Stock and Taming New Frontiers
Michael Hanson and Janice Lindquist, CPC Co-Chairs

Taking Stock and Taming New Frontiers, the 2014 NASIG Annual Conference, will be held in Fort Worth Texas May 1 through May 4, 2014. The conference hotel is the historic Fort Worth Hilton. The site is in downtown Fort Worth near the 35-block Sundance Square entertainment and shopping district. Be sure to bring your walking shoes. Check out all of the fun things to do and see in Fort Worth (http://www.fortworth.com/). Stroll around Butch Cassidy's old stomping grounds, and visit Billy Bobs, the "World's largest Honky Tonk." There's a lot to see and do, so put on your two steppin' shoes and get ready for Fort Worth!

Please contact the Conference Planning Committee at confplan@nasig.org if you have any questions, suggestions or concerns. We look forward to seeing y'all in Texas!

PPC Update: Call for Proposals
October 1 – November 15
Kelli Getz and Anna Creech, PPC Chair and Vice-Chair

The Program Planning Committee will hold one Call for Proposals from October 1 – November 15, 2013 for the 2014 NASIG Annual Conference. The decision to reduce the number of Call for Proposals to a single call was made to alleviate confusion and to streamline the proposal process. More information regarding the proposal submission process will be available in the coming weeks.

An important change for the 2014 NASIG Annual Conference is that **all** speakers will be required to sign a memorandum of understanding (MOU) in order to clearly communicate in advance the expectations for NASIG speakers. The MOU is currently being developed in collaboration with the Board and the *Proceedings* Editors, but will be made available before the Call for Proposals opens on October 1.

The 2014 PPC is looking forward to carrying on the tradition of bringing thought-provoking Vision Speakers, exciting preconferences, and innovative sessions to the NASIG Annual Conference. Please contact the PPC Chairs at prog-plan@nasig.org if you have any questions.

Post Conference Wrap-up

28th Annual Conference (2013)
Business Meeting Minutes

Buffalo Niagara Convention Center, Buffalo, NY
June 7, 2013

1. Call to Order

2012/2013 NASIG Executive Board:
President: Bob Boissy
Vice President/President-Elect: Joyce Tenney

Past President: Steve Shadle
Secretary: Shana McDanold
Treasurer: Jennifer Arnold
Members at Large: Chris Brady; Patrick Carr; Stephen Clark; Tim Hagan; Selden Lamoureux; Allyson Zellner

2. Highlights from the Past Year, Presented by Bob Boissy

NASIG is financially sound and we are working on building up our endowment.

We have developed and started a webinar series with four webinars a year. Thus far it's been a revenue generator with bargain rates for group access, and a service to the greater information community. Many thanks to the Continuing Education Committee for making this happen successfully. Please contact them with feedback and/or suggestions for topics.

Thank you to the Electronic Communications Committee for all their work in planning a website upgrade and overhaul. A new NASIG website is coming soon!

We have plotted course for next two NASIG conferences that will be successful and in some ways new. We look to broaden our base of participation by broadening our base of programming.

As highlighted in the NASIG President's talk at UKSG (available on YouTube: http://www.youtube.com/watch?v=lNEpWJtxbIE), NASIG may not engage in standards directly as an organization, but our members work closely with NISO and we recognize that collaboration is important. A reminder that NASIG members get NISO member rate for NISO webinars, and we encourage NASIG members to work with NISO to make changes to standards as needed. We look to broaden our base of participation by broadening our base of programming through our partnerships.

We continue our support for awards to attend conferences, support for related conferences and outreach via the Student Outreach Committee to engage with library schools. We are working to ensure that NASIG is listed as an option for student memberships in professional organizations in every library and information school.

We remain an agile organization. In recent weeks, we had a recommendation from Char Simser to move the Publicist position to our Electronic Communications Committee to make ECC the main marketing/publicizing arm of the organization. The publishing aspects of our PubPR group will be connected to Continuing Education

Committee to support their efforts. We have agreed to trial this new alignment and will assess it as an Executive Board in Feb. 2014.

In late breaking news, we have decided to name Guns'n'Roses as our official house band.

3. Secretary's Report, Presented by Shana McDanold

The Executive Board is continuing to explore the technology and software needs of the organization, exploring new tools available to us such as RegOnline and SurveyMonkey. We are looking forward to the website upgrade to explore the new tools it will provide and determine how we can make the best use of them.

Also reviewing and improving our author and speaker contracts and memorandums of understanding to improve the clarity of the contracts and MOUs and ensure there is consistency of language across all our documents. We value our presenters and authors and want to make sure things run as smoothly as possible.

4. Treasurer's Report, Presented by Jennifer Arnold

NASIG finances continue to be healthy, and the investment account has made moderate gains over the past year. The slight difference in total equity between this year and last year at this time can be attributed to an increase in up-front payment for conference costs.

As of May 30, 2013:
Equity total: $530,512.14
Investment account: $107,629.14
Checking account: $34,873.22
Savings account: $388,009.78

Committee expenditures are under budget estimates at this point.

Our revenue from the four webinars totals $6,760.09.

For the 2013 Conference, we had twenty-six sponsors providing a total of $34,000. Thank you to all of our

sponsors for their support! In addition, we added six organizational memberships for a total of $9,000.

5. Introduction to the 2013/2014 Executive Board, Presented by Christine Radcliff and Trina Nolen (Nominations & Elections Committee Co-Chairs)

Radcliff introduced the 2013/2014 Board:
President: Joyce Tenney
Vice President/President-Elect: Steve Kelley
Past President: Bob Boissy
Secretary: Shana McDanold
Treasurer: Jennifer Arnold
Treasurer Elect: Beverly Geckle
Members at Large: Chris Brady; Clint Chamberlain; Tim Hagan; Selden Lamoureux; Sarah Sutton; Peter Whiting

6. Recognition of Outgoing Board Members and Committee Chairs, Presented by Sandy Folsom and Leigh Ann DePope (Awards & Recognitions Committee Co-Chairs)

Folsom recognized the following outgoing committee chairs for their outstanding service:

Archivist: Peter Whiting
Awards & Recognition: Sandy Folsom
Bylaws: Elizabeth McDonald
Continuing Education: Lori Duggan
Conference Planning: Susan Davis and Cindy Hepfer
Core Competencies: Sarah Sutton
Database & *Directory*: Mary Bailey
Evaluation & Assessment: Sally Glasser
Electronic Communications: Char Simser and Sarah
    Gardner
Financial Development: Elizabeth Parang
Membership Development: Steve Kelley
Mentoring: Taryn Resnick
Nominations & Elections: Christine Radcliff
Program Planning: Karen Davidson
Proceedings Editor: Sharon Dyas-Correia
Publications & Public Relations: Bob Persing
Registrar: Michael Arthur
Student Outreach: Eugenia Beh

Folsom also recognized the following Board members and thanked them for their service:
Member at Large: Patrick Carr
Member at Large: Stephen Clark
Member at Large: Allyson Zellner
Past President: Steve Shadle

7. Discussion of Old Business, Presented by Bob Persing (Parliamentarian)

There was no old business.

8. Call for New Business, Presented by Bob Persing (Parliamentarian)

Persing recognized Bob Boissy.

Boissy asked for a trial rearrangement for our committee structure in the past? Are there any concerns about the trial?

Persing reported he was not aware of any past trials. There were no concerns or objections from the attendees about the trial.

Adolfo Tarango noted that when Steve was editor of the *Newsletter*, he was added as Ex Officio of the Board and it was determined to be successful and the Ex Officio role was formalized.

There was no additional new business.

The meeting adjourned at 5:25pm.

Minutes submitted by:
Shana McDanold
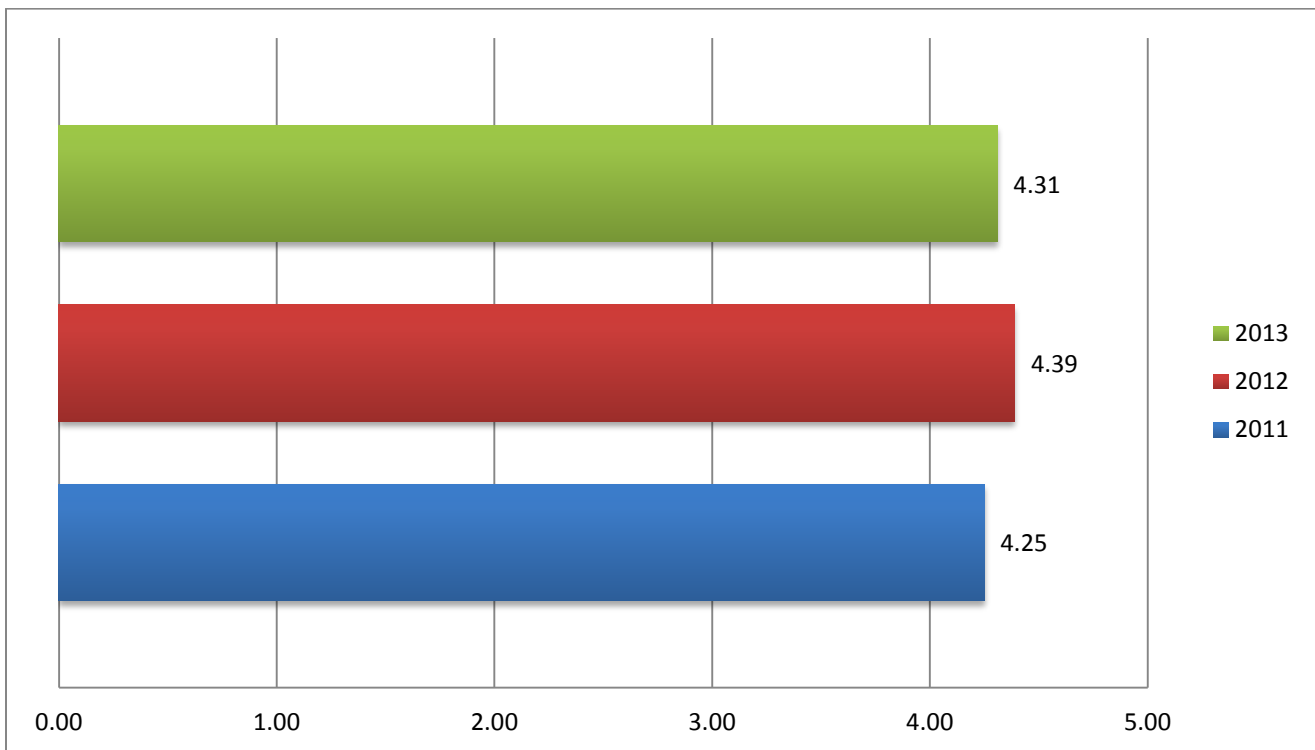Secretary, NASIG Executive Board
June 30, 2013

2013 Conference Evaluation Report
to the NASIG Executive Board
Art & Information, Architecture & Knowledge
June 6-9, 2013

Submitted by

2013 Evaluation & Assessment Committee:
Sally Glasser (Chair), Jennifer Leffler (Vice-Chair),
Bridget Euliano, Maria Hatfield, Carole McEwan
NASIG's 28th annual conference was held in Buffalo,
New York. The conference featured four pre-
conferences, three vision sessions, thirty program
sessions, and seventeen sessions in the new "Great
Ideas Showcase" (formally poster sessions). Other
events included a first timers/mentoring reception,

informal discussion groups, a vendor expo, a dessert
reception with live Jazz music, and an evening event at
the Buffalo Transportation Pierce Arrow Museum.

This year, 285 of the 417 conference attendees
completed all or part of the online evaluation form. This
68% response rate reflects an increase of 10% from last
year's rate of 58%. This was the seventh year that the
evaluation form was available online. Those who
completed the online evaluation were eligible to enter a
drawing for a $50 Amazon gift card. The winner will be
announced in the NASIG Newsletter.

Below is a summary of the evaluation results.

CONFERENCE RATING

Overall Conference Rating

Respondents were asked to give ratings on a scale of 1
to 5, with 5 being the highest rating. The overall rating
for the 2013 conference was 4.31. This is lower than
the overall rating for the 2012 conference, but higher

than the rating for the 2011 conference, which was 4.39
and 4.25 respectively.

Facilities and Local Arrangements
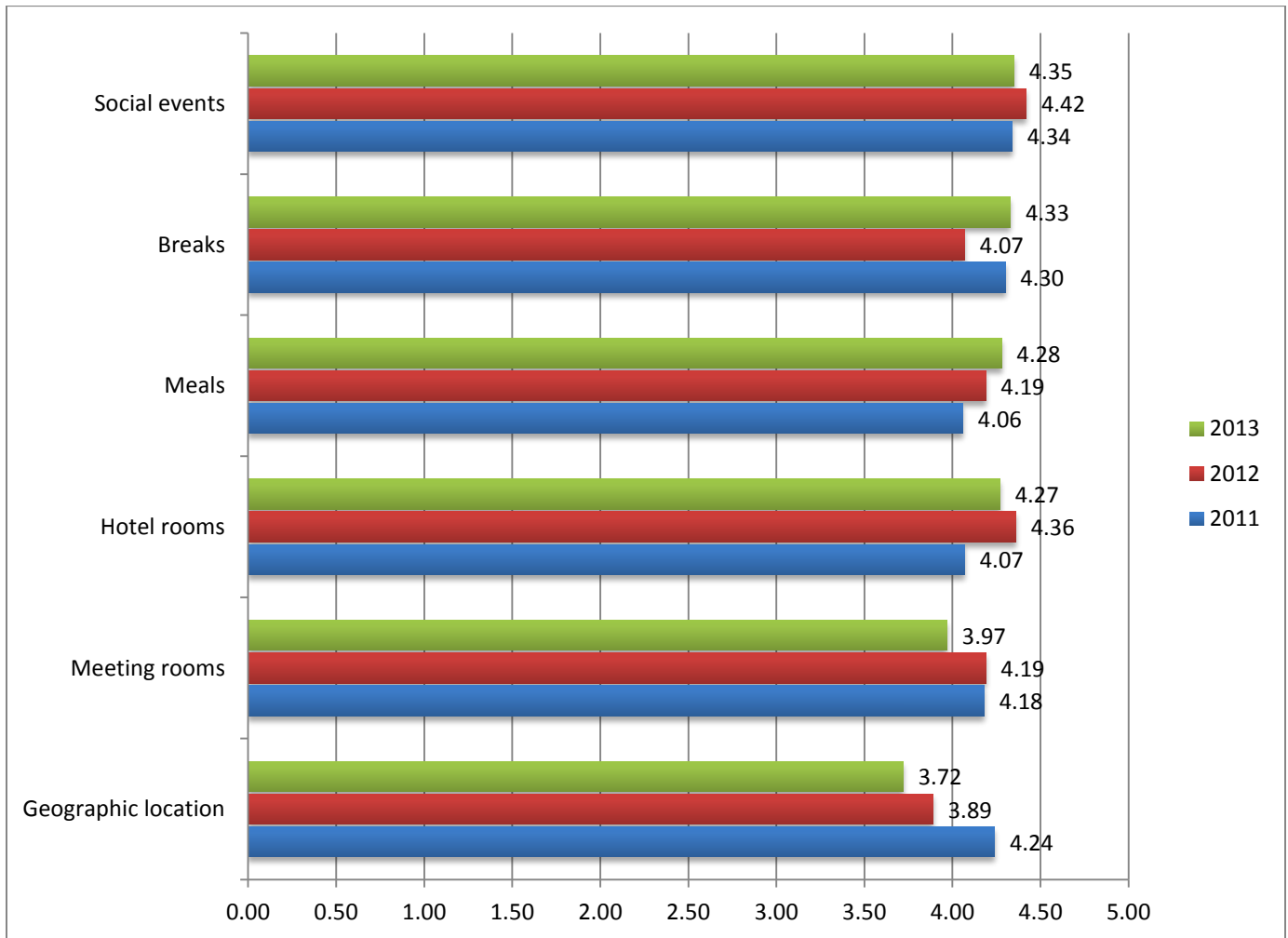
Ratings for the facilities and local arrangements at this year's conference varied from last year's with some ratings being higher while others were lower. While the breaks and meals were rated higher than both the last two conferences, the ratings for hotel rooms, meeting rooms, geographic location, and social events were all lower than the 2012 ratings. Geographic location dropped for the second year in a row with an overall average rating of 3.72, down from 3.89 for Nashville, TN (2012 conference) and 4.24 for St. Louis, MO (2011 conference). A look at the comments revealed concerns about nighttime safety and difficulty getting to Buffalo from places other than the East Coast. One responder wrote that while Buffalo turned out to be more interesting than expected, NASIG might attract more conference attendees with more appealing locations.

The biggest drop among the facility ratings was for the meeting rooms. Reasons were squeaky uncomfortable chairs, temperature issues (rooms too cold), and a lack of tables and Wi-Fi in the rooms. Better room signage or a map of the facility was a suggested improvement. Some commented that the exhibition center was too far a walk and that it had bad acoustics.

On a positive note, breaks and meals rated higher in 2013 than both 2012 and 2011. The breakfasts enjoyed many positive comments, as did the hotel staff. While the hotel room rating decreased from 4.36 in 2012 to 4.27 in 2013, the 2013 rating was still quite a bit higher than the 2011 rating of 4.07. Social events also rated lower than last year with 4.35 as compared to 4.42, but slightly higher than the year before. Dine-arounds were generally positively received, although a couple of

survey responders commented that they would have preferred more cultural social events such as organized or guided tours. The dessert reception enjoyed numerous positive reviews. The reception at the Pierce Arrow Museum received mixed reviews with many commenting that they enjoyed the museum itself as well as the speaker, but found the food to be less appealing.

Online Conference Information
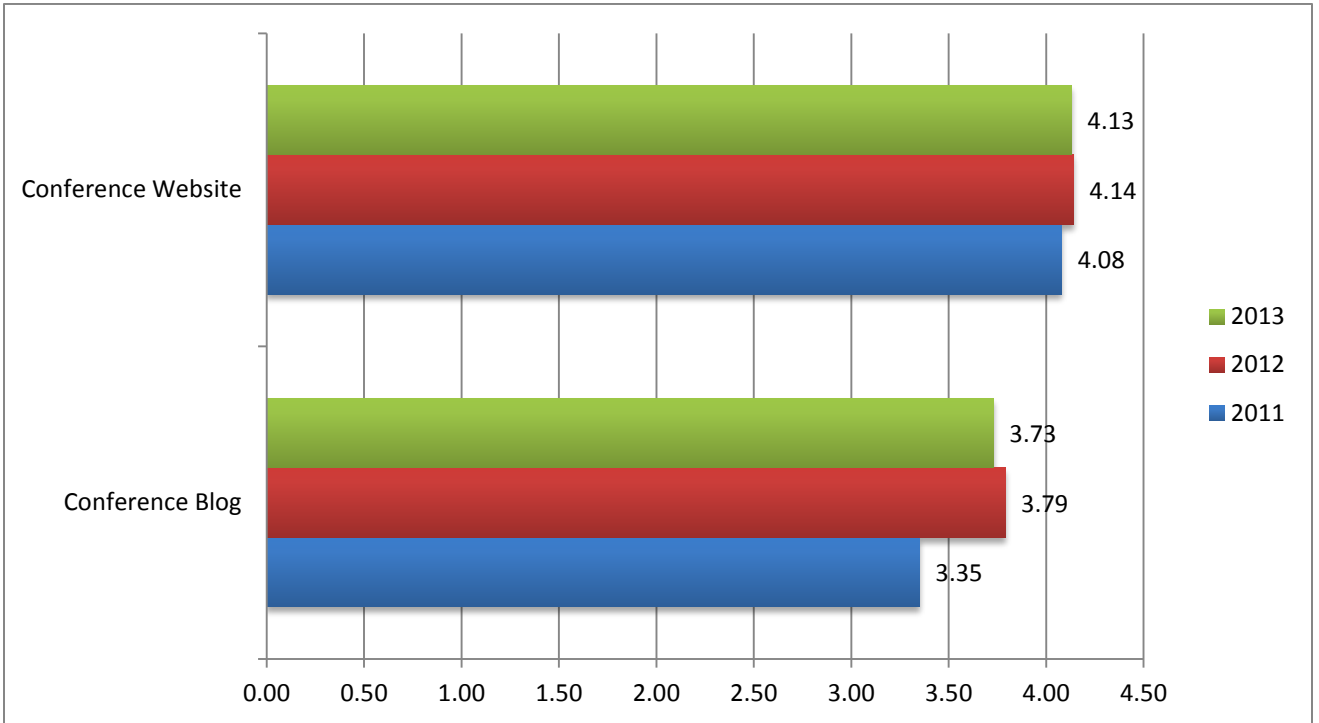
The conference web site rating was virtually unchanged in 2013 (4.13) as compared to 2012 (4.14), although the conference blog rating dropped slightly from 3.79 in 2012 to 3.73 in 2013. The majority of the responses indicated that people generally did not follow the blog. Some responders did not know there was a conference blog. The phone app for smartphones was positively received as was the daily email update function.

Survey results showed that 71.7% of the 2013 conference attendees who completed the survey brought a laptop or tablet to the conference. The 2013 evaluation survey was the first to include "tablet" in this question. In prior years, the survey asked only whether attendees brought a laptop with them. In 2012, 56.4% indicated they brought a laptop with them, slightly up from the 53.8% who indicated they had a laptop at the 2011 conference. It is hard to know the extent to which the jump from 56.4% in 2012 to 71.7% in 2013 is due to the addition of "tablet" in the question. What is known is that a large number of NASIG conference attendees bring either laptops or tablets with them.

This year's evaluation also asked responders to rate the necessity for wireless access in meeting rooms. Whenever possible, NASIG negotiates for wireless access in meeting rooms, but in some locations it is quite expensive. In Buffalo, there was wireless access in the hotel rooms, but not in the meeting rooms. The average rating for wireless access in meeting rooms was 3.87. Comments indicated a mix of opinions ranging from absolute necessity of wireless access in meeting rooms to it being unnecessary as long as there is wireless in the hotel rooms (for checking email and the like). Some noted that taking notes during sessions is possible without wireless capability; others were

disappointed that they were not able to use social media such as Twitter during sessions. Although not directly related to the question, several respondents suggested more tables and outlets in meeting rooms for easier use of laptops and tablets.

NASIG again used the online store Café Press for conference souvenirs. While most respondents (71.9%) did not visit the store, 25.6% did like the selection of items. Some commenters questioned the necessity of this online store, some mentioned poor quality although good customer service (poor quality items were replaced for free), and others noted an interest in general NASIG items not related to any particular year or conference.
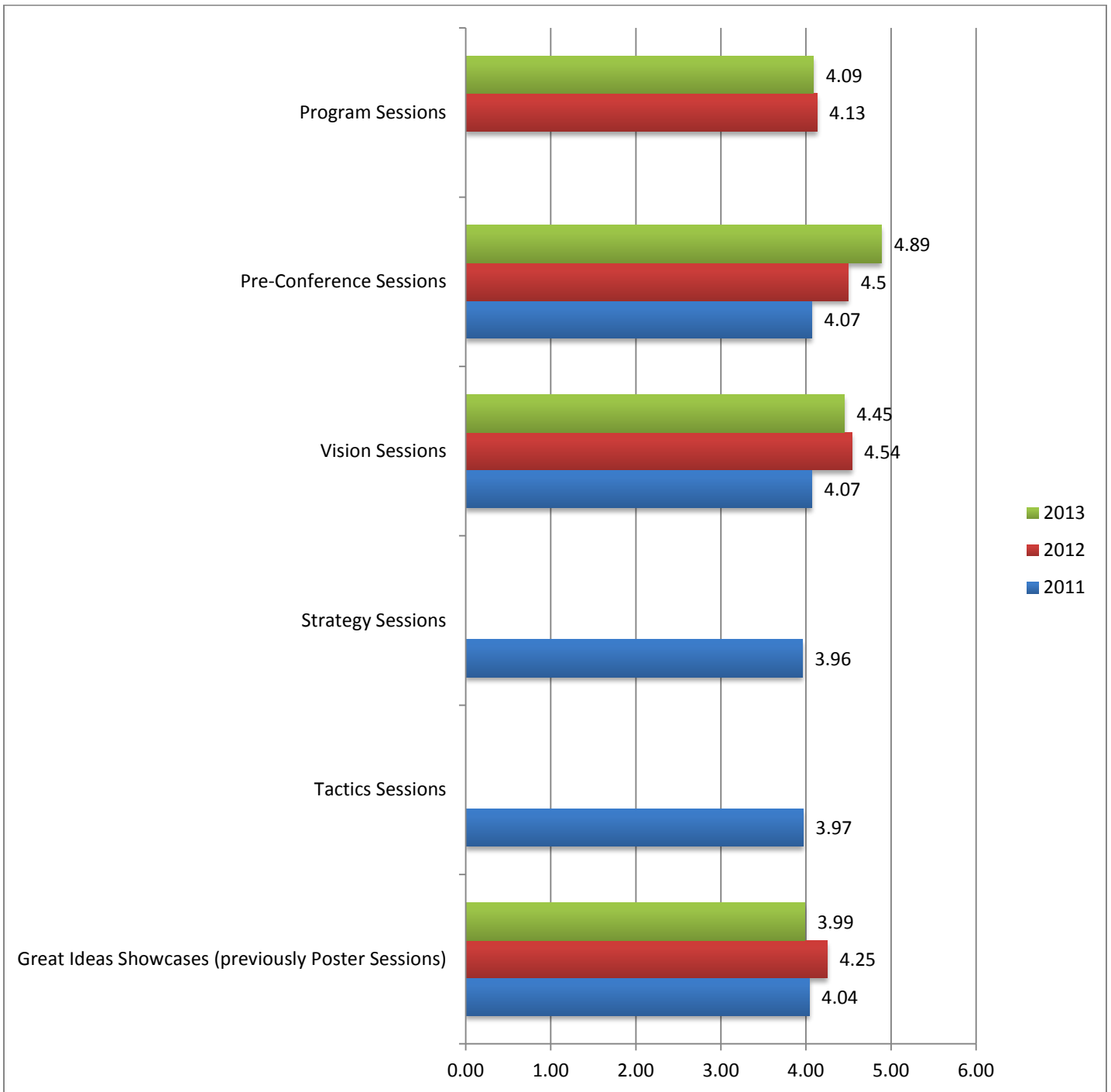

PROGRAM

Respondents were asked about the balance in the types of programs offered. This year's overall rating was 4.15, down from last year's rating of 4.21, but up from the 2011 rating of 3.97. Comments were generally positive about the variety of topics. Several commented on the

high quality of this year's keynote addresses. Some respondents felt there were too many sessions aimed at beginners and one commenter would have preferred more programs on RDA outside of the pre-conferences, which come at an additional cost.

Respondents were asked if the layout and explanation of program choices were easy to understand. This year's rating was 4.09; down from both last year's rating of 4.38 and the 2011 rating of 4.12. Comments indicated a frustration with the condensed printout, which excluded information about the Great Ideas Showcase and the informal discussion groups. One commenter happily used the web program, but was unable to expand to view the session descriptions due to lack of wireless access in the meeting rooms. A few respondents bemoaned the lack of a map of the meeting rooms or better signage, and some felt that the session titles or short descriptions did not adequately represent the programs.

Respondents were also asked about the overall design of the conference schedule. They were given three topics to rate. The first concerned the time for breaks. Most people felt that the time allotted for breaks was just right; giving this a rating of 4.42, up from 4.18 in 2012. Next respondents were asked about the length of the sessions. This rated 4.47, virtually unchanged from 2012's 4.46 rating, and an indication that responders overwhelmingly felt the length of the sessions was appropriate. Despite the high rating, a few comments noted that some sessions ended early (30 minutes) while other sessions, particularly those with multiple presenters, needed more than one hour. Lastly, responders were asked about the pace of the conference as a whole. Responders rated this positively at 4.45, down only slightly from 4.47 in 2012.

Average Sessions Ratings[1]

Program Sessions
- 2013: 4.09
- 2012: 4.13

Pre-Conference Sessions
- 2013: 4.89
- 2012: 4.5
- 2011: 4.07

Vision Sessions
- 2013: 4.45
- 2012: 4.54
- 2011: 4.07

Strategy Sessions
- 2011: 3.96

Tactics Sessions
- 2011: 3.97

Great Ideas Showcases (previously Poster Sessions)
- 2013: 3.99
- 2012: 4.25
- 2011: 4.04

Legend: 2013, 2012, 2011

Axis: 0.00, 1.00, 2.00, 3.00, 4.00, 5.00, 6.00

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[1] In 2012 the session organization was changed, replacing strategy and tactics sessions with general one hour long program sessions. For this reason, there is no 2012 or 2013 data for strategy or tactics sessions, and no 2011 data for program sessions.

This year the conference featured three vision sessions: Libraries and Mobile Technologies in the Age of the Visible College by Bryan Alexander (4.27), The Value of Serials in Academic and Special Libraries by Megan Oakleaf (4.60), and Googlization and the Challenge of Big Data by Siva Vaidhyanathan (4.47). The average rating for these sessions was 4.45, which is lower than last year's rating of 4.54 but higher than 2011's rating of 4.07. Despite the drop in the overall rating, comments throughout the survey indicate positive reactions to the vision sessions of the 2013 conference.

There were a total of thirty program sessions in the 2013 NASIG Annual Conference. Ratings varied from 3.43 to 4.61 with the average being 4.09. This is a slightly lower average rating than last year's 4.13. The 2013 session with the highest score (4.61) was Textbook Affordability: Is there a Role for the Library? by Dean Hendrix and Charles Lyon.

Poster sessions were replaced by the Great Ideas Showcase in 2013 and included significantly more exhibitors than in the past. In 2012 there were six poster sessions; in 2013 there were seventeen presenters in the Great Ideas Showcase. Ratings ranged from 3.42 to 4.36 with an average overall rating of 3.99. This is a drop from the last two years. However, the slight format change and the increase in number of exhibitors may have had an effect on the average. The highest Great Ideas Showcase rating (4.36) went to Round ERM Up: Corralling E-Resources Using Google Sites by Rosemarie Reynolds.

In replacing the Poster Sessions, the Great Ideas Showcase sought to provide an opportunity for participants to share innovative ideas in a wider variety of ways (posters, laptops, tablets, e-readers) at tables that allowed attendees to mingle. In order to gauge the success of this change, survey questions were added to rate the Great Ideas Showcase and ask whether conference attendees would like NASIG to continue this. The average rating for the Great Ideas Showcase was 3.90 with 75.2% of respondents stating that they would like to see this continue in the future. Comments indicated that the space was cramped, making it difficult for more than one or two people to see the session, and that in situations where presenters had only a laptop or tablet, it would be better to also include a poster or some sort of signage that would allow others to see the topic from behind the crowd. A few respondents were unclear about what the Great Ideas Showcase was and one was upset because this was not in the printed program and he/she therefore missed it. Two comments suggested that this would be better placed in the time slot directly after a lunch break.

There were four pre-conferences featured this year with ratings varying from 4.83 to 5.0, with an average of 4.89. This rating is quite a bit higher than in the last two years with the 2012 average being 4.5 and the 2011 average being 4.07. The session entitled Copyright in Practice: a Participatory Workshop by Kevin Smith received a perfect 5.0 score.

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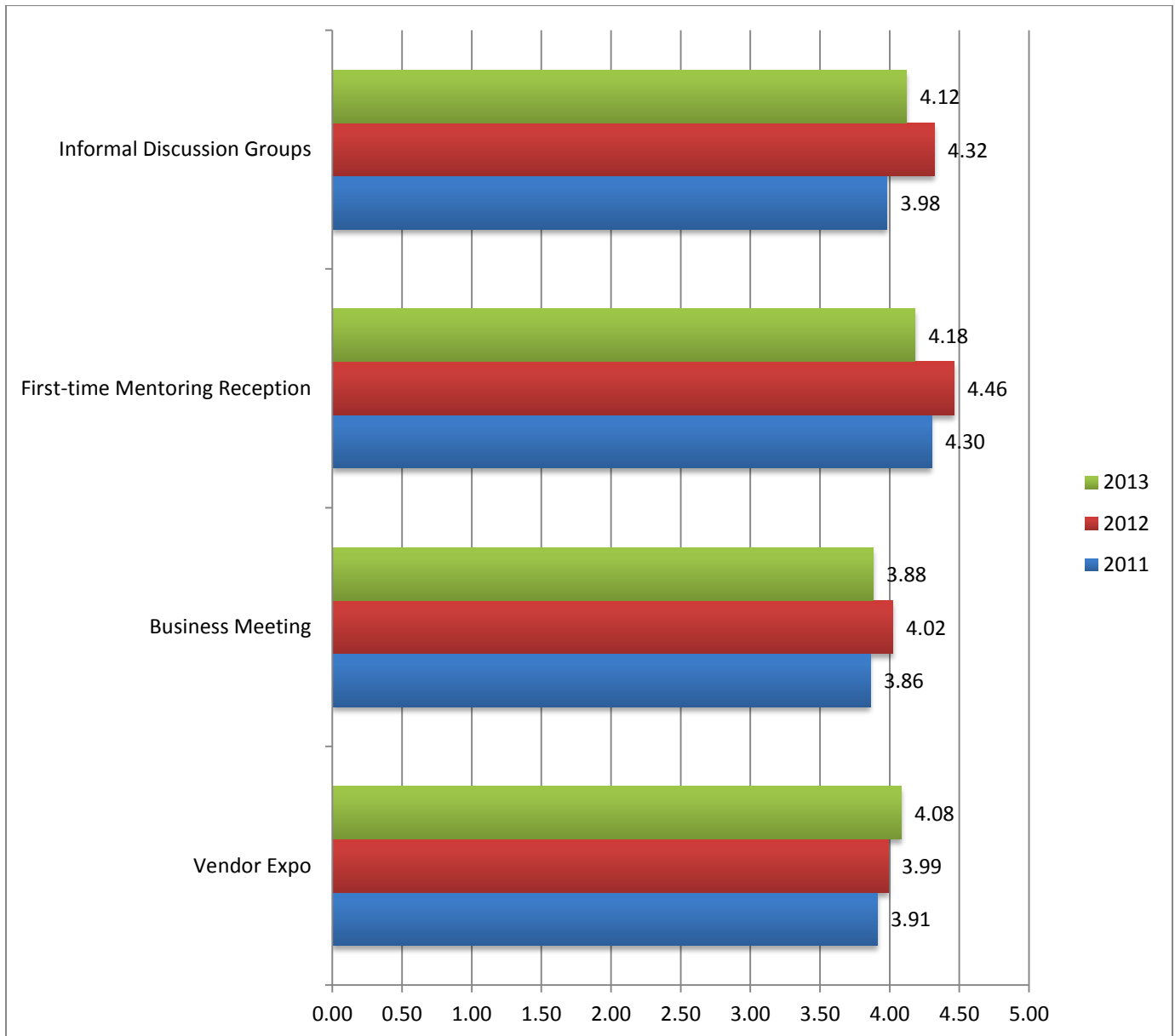
The 2013 NASIG Conference offered fifteen informal discussion groups, up from nine during the 2012 conference and 14 in 2011. The ratings for the informal discussion groups ranged from 1 (lowest possible rating) to 5 (highest possible rating). The average rating was 4.12, a decrease from last year's 4.32 but an increase from the 2011 rating of 3.98. The first-timers/mentoring reception rated a 4.18, a significant dip from last year's 4.46 and even lower than 2011's rating of 4.30. Despite this, 89% of respondents favored the continuation of this event in the future. The business meeting also dipped to 3.88 from last year's 4.02, but was slightly higher than the 2011 rating of 3.86. The vendor expo rating increased for the second year in a row with a 2013 rating of 4.08 as compared to 3.99 and 3.91 for 2012 and 2011 respectively. Responders liked the fact that the expo was together with the reception. 89% of respondents agreed that the vendor expo should continue in the future.

RESPONDENT DEMOGRAPHICS

Respondents by Organization Type
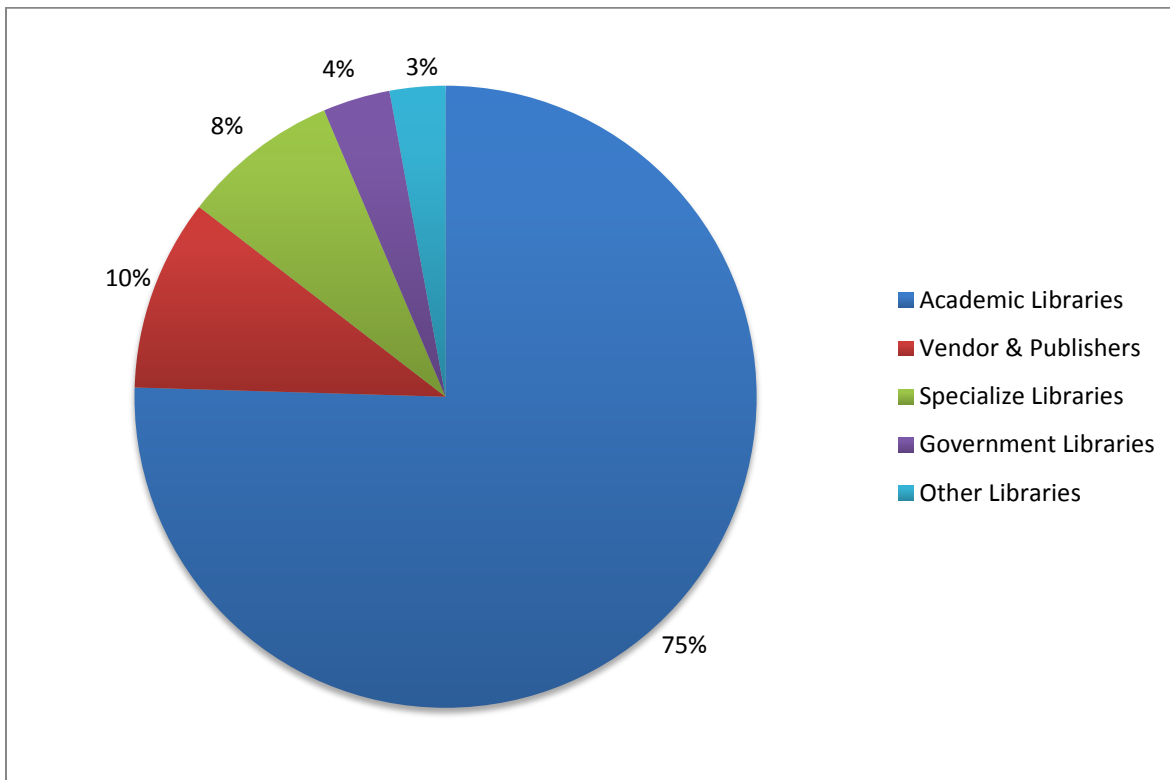
Academic library employees continue to represent the largest group of respondents (76%). This includes university, college, and community college librarians. Responses from the vendor and publisher community, including subscription agents, publishers, database providers, automated systems vendors, and book vendors comprised 10% of the total respondents. This was lower than in 2012 and 2011, which were 11% and 13% respectively. Attendees from specialized libraries including medical, law, and special or corporate libraries made up 8% of respondents, which is lower than last year's 9%, but higher than 2011's 6%. Government, national and state libraries represented only 4% of the respondents. The remaining 3% of respondents

included public libraries, library network, consortium, or utility, and those selecting 'other'.

Respondents were asked to describe their work, selecting more than one category as applicable. The largest respondent groups identified themselves as serials librarians (41.3%), followed by electronic resources librarians (39.6%), catalog/metadata librarians (26.1%), and acquisitions librarians (24.7%). Licensing rights managers comprised 15.2% of respondents, collection development librarians 14.5%, and technical service managers also 14.5%. Paraprofessionals comprised 10.6% of the respondents. All other categories were selected by less than 10% of respondents.

Respondents by Years of Experience
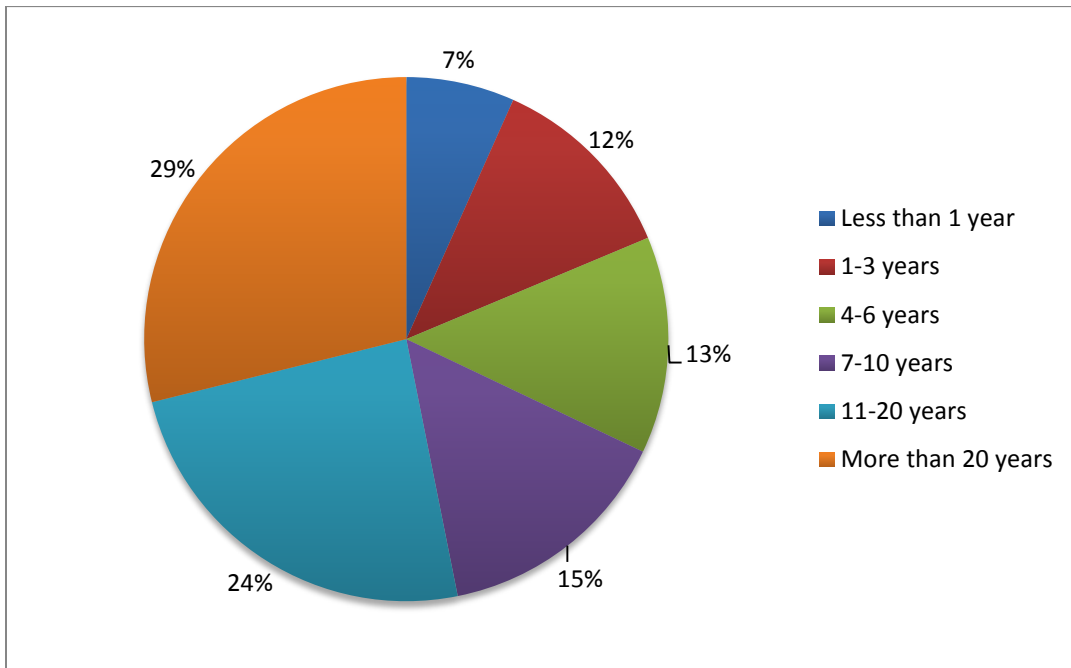
When asked for the amount of serials-related experience, the majority of respondents were in the category of more than 20 years (29%) or 11-20 years (24%). Those with 10 or fewer years of experience comprised 47% of respondents, (see chart above for exact breakdown).

Respondents by Number of NASIG Conferences Attended
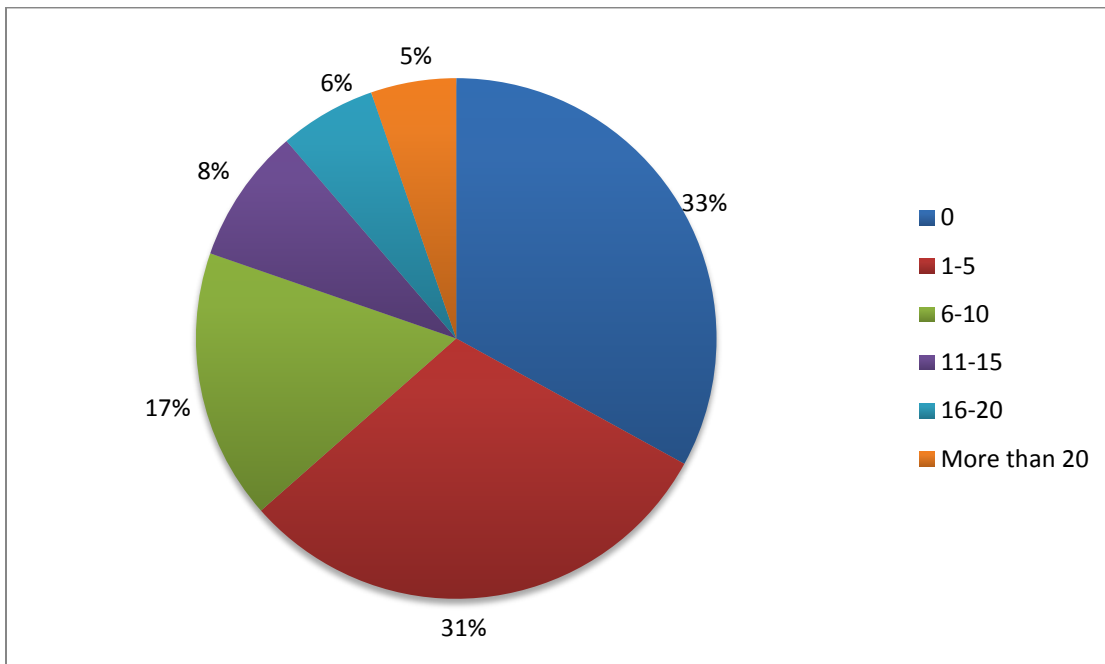
There were many new attendees this year, with 33% of respondents indicating that this was their first NASIG annual conference. 31% of respondents had attended 1-5 previous conferences, 17% had attended 6-10, 8% had attended 11-15, 6% had attended 16-20, and 5% had attended more than 20 NASIG conferences.

NASIG 2013 Conference Reports

Vision Sessions

Libraries and Mobile Technologies
in the Age of the Visible College

Bryan Alexander, Senior Fellow at the National Institute for Technology in Liberal Education (NITLE)

Reported by: Mary Ellen Kenreich

Author Supplied Abstract: How is the mobile revolution transforming libraries? What will library services and librarians look like in the age of a ubiquitously networked civilization? We begin by surveying what changes have already hit: an expanded device universe, the e-book renaissance, the growth of new media ecosystems, nearly-always-on user access, and the initial switch from 'library as place' to 'place as library'. Next we assess how mobility has impacted academia, from teaching to research and student life. Then we explore scenarios of the future, based on an analysis of current trends. Scenarios include: Post-Residential Academe; Open World; Silo World; Alt.Residential.

Bryan Alexander, publisher of the monthly online report, *Future Trends in Technology and Education*, gave a lively presentation on new mobile technologies related to education. Technology is changing rapidly, and with Alexander's fast paced presentation, one might wonder what else had developed during his talk.

Personal computing has made a progression from the desktop computer, to laptop computers, and now has exploded into many handheld devices. Smartphones, for example, are used for content delivery, for social interaction and for capturing content. Internet access is no longer confined to a stationary desktop; the smartphone is now our primary gateway to the internet. Tablets, e-book readers, and a multitude of other handheld devices are now mainstream.

Alexander discussed technologies such as clickers (http://www1.iclicker.com/) and smartpens (http://www.livescribe.com/en-us/smartpen/) used in classrooms. Clickers are used in classrooms for gathering feedback, answering quiz questions, and for assessment; the results can drive class discussion. Clickers allow a large lecture class to engage in an interactive learning environment. Alexander asked how many of us know about smartpens. They are a highly portable and multifunctional device used as a text scanner, audio recorder, and for web access. Technology is revolutionizing classroom instruction.

A few general technology changes were discussed as well. Touch screens, gesture based computer interfaces, and Google Glass may make the mouse and keyboard obsolete. Mobile devices drive the creation of micro content. *Vine* is an example of a mobile app designed to capture micro videos up to six seconds in length and share it with a world of people with an insatiable appetite for media.

Alexander then moved on to gaming and how it has changed the world. People of all ages, races, and genders are gamers and the games are just as diverse as the individuals playing them. Games can be serious, public, political, etc. and can have a massive audience. "Gamification" means taking game principles out of the game context to engage people and change behavior. We can use games to impact society in a positive way. Alexander doesn't endorse it; he just knows it is happening.

ARIS (http://arisgames.org/) is open source platform for designing educational games or virtual tours to promote learning. With the ARIS app, you can go to a location, hold up your device and get more information about what you are viewing. *Wikitude myWorld* can be used to create an augmented reality scenario with a handheld device. *iTacitus* is a program developed in Europe to encourage cultural tourism. It uses augmented reality to overlay a scene or annotate a view with text and videos, and is used at museums and historical sites. *Google Goggles* is an app for taking a picture and searching Google. It is a visual, rather than a text search.

Bryan concluded his presentation by presenting three scenarios for 2023. It will be the world of the future, transformed by what is happening now.

1) Phantom Learning
Schools are rare and distant. Information is plentiful and we get it on demand. Institutions supplement information. MOOCs are common. Libraries are software.

2) Open World
Open access and open source is the norm. There are global conversations, with more information and more access. Creativity abounds and campus is chaotic. Authorship is hard to pin down. Privacy is fictitious.

3) Silo World
The Web is over. Information is in vertical stacks, and we love our stacks. Careers are within those stacks. "Open" was a flawed historical concept.

About the Presenter

Bryan Alexander is senior fellow at the National Institute for Technology in Liberal Education (NITLE). He researches, writes, and speaks about emerging trends in the integration of inquiry, pedagogy, and technology and their potential application to liberal arts contexts. Dr. Alexander's current research interests include emerging pedagogical forms enabled by mobile technologies, learning processes and outcomes associated with immersive environments (as in gaming and augmented reality), the rise of digital humanities, the transformation of scholarly communication, and digital storytelling.

The Value of Serials in Academic and Special Libraries

[Megan Oakleaf](), Associate Professor of Library and Information Science, Syracuse University

Reported by: Heather Barrett

Oakleaf discussed serial collections and how libraries have attempted, and often failed, to measure and demonstrate the value of collections to their institution's administration. While it is important to measure and demonstrate the value of all library collections, it is especially critical to do so for serials, given that serials collections (including periodicals and electronic resources) consume a large percentage of library budgets and their costs are steadily on the rise. Unfortunately, the data we have typically collected

about serials such as usage statistics, user satisfaction, the size and monetary value of the collection, and return on investment are not compelling metrics of value for institution administrators. Collection-centered data without context tend to elicit the response, "So what?"

Instead, we need to start collecting and communicating information about the impact of serials: the value of serials in meeting the needs of users and in supporting the mission, values, and goals of the parent institution. Impact is not about the size or value of the serials collection, but rather what people are accomplishing through the use of the collection and how the institution values that outcome. Measuring impact highlights the importance of the collection's influence on outcomes and administrators are more likely to respond, "Tell me more!"

Librarians must first identify areas that are most important to their institution and then be able to tell administrators what the serials collection contributes to those priorities. For example, higher education priorities might include student recruitment, learning outcomes, alumni career success and lifelong learning, faculty teaching and research, faculty grant-seeking, institutional prestige, and accreditation. Corporate priorities might include efficiency of operations, decision making, project planning and progress, quality of client relationships, and exploitation of new opportunities. Medical priorities might include diagnosis and treatment, quality of patient care, and reducing patient mortality.

The next step is to develop defined outcomes describing the impact of serial collections on users. An outcome might take the following form, "[Users] will be able to do [thing that the institution or organization values]." For example, "Students will be able to effectively evaluate information found in serials"; "Doctors will be able to make more accurate diagnoses using serials"; or "Lawyers will be able to win more cases using serials." Once the outcomes are developed, we must determine how we will know that the outcome has been met and

what data we will collect in order to reach that conclusion.

This brings us back to the problem that most of the data we have typically collected about our serials collection is insufficient for analyzing impact. We need to collect different data within the library and ask vendors for data that supports determining the impact of subscribed materials. Specifically, we need data about what individual users are doing with serials. The usage data we currently get is aggregated group-level data with no information about individual users. Starting an analysis with individual-level data would help libraries track how subscribed content is used. Any personal identification information about the users could be hidden to preserve privacy. ACRL is working on a product that can track who is using materials and for what purpose. Vendors may already have individual-user data for their own product improvement research. Librarians need to start asking for this kind of data; in the meantime, they can start small and perhaps partner with researchers who are already working at their institutions.

Finally, we must communicate the results of our assessments of impact. Impact-based value assessment can help ensure that library budgets don't suffer needlessly. Perhaps even more importantly, we can discover new and better ways to improve our resources, expertise, and services to users and to further expand the impact of library collections.

About the Presenter

Megan Oakleaf is an Associate Professor of Library and Information Science in the iSchool at Syracuse University. She is the author of the Value of Academic Libraries Comprehensive Review and Report and has earned recognition and awards for articles published in top library and information science journals. Her research areas include outcomes assessment, evidence-based decision making, information literacy instruction, and academic library impact and value.

Dr. Megan Oakleaf has done extensive research, speaking, and writing on the topics of library assessment and evidence-based decision making. Her publications include *Value of Academic Libraries: A Comprehensive Research Review and Report* for ACRL and *Academic Library Value: the Impact Starter Kit*.

The Aggregator Database: Cornerstone or Annex?

Beverly Geckle, Middle Tennessee State University
Suzanne Mangrum, Middle Tennessee State University

Reported by: Sharon K. Scott,
Edited by: Beverly Geckle

Author Supplied Abstract: With the goal of building a high quality academic library collection in mind, the presenters evaluated the value of journal content accessed through journal aggregator database(s). Data from aggregator provider(s) and data from UlrichsWeb was used to evaluate content with respect for quality, format, coverage, and cost. In addition the presenters shared the analysis with library liaisons to inform them of "true holdings" to assist them with collection development.

The research conducted by Geckle and Mangrum focused on e-journal collection development and assessment. The content of EBSCO's Academic Search Premier (ASP) was analyzed for quality. A base level of quality was determined to be content from peer-reviewed journals, with full-text access and available in PDF format. Further filtering was completed to consider holdings coverage. Academic Search Premier was chosen as it was popular on campus and data could be downloaded into Excel. Ulrich's Web was consulted to identify journals in ASP in the following subject areas: business & economics, social sciences & humanities, government & law, education and sports & recreation. Journal Citation Reports (JCR) was used to identify impact factors and scholarly rankings. Microsoft Excel was used to find common titles in the subject sets from Ulrich's and JCR top impact titles.

The final title lists of high quality journals were grouped into the following coverage categories: to present, end date, and embargo. The results were not surprising. A significant number of the ASP journals in the subject areas investigated were not top ranked journals and if they were most of those had limited coverage or were embargoed. The results did highlight the relationship between discovery and access within the context of aggregators. In many cases ASP may not have the full-text content, but if the library subscribes to the title directly with the publisher then the patron still obtain access. Aggregators seem to be less content providers but indexing and discovery services. Now that discovery services such as EBSCO's EDS are available the value of the aggregator is drawn into question.

About the Presenters

Beverly Geckle earned her MLS in 2000 from the University of Maryland, College Park. She is the Serials & Government Documents Librarian in the Collection Development & Management Department at Middle Tennessee State University where she has worked since 2006. Prior to MTSU she was the Serials Librarian at the University of Baltimore Law Library.
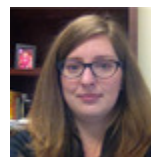
Suzanne Mangrum earned her MLS in 2003 from the University of Southern Mississippi. She began her library career as the Acquisitions Librarian at Christian Brothers University in Memphis. She has been at MTSU for seven years in the Collection Development and Management Department.

Building a Foundation for Collection Management Decisions: Two Approaches

Leigh Ann DePope, Salisbury University
Mark Hemhauser, University of Maryland
Rebecca Kemp, University of Maryland

Reported by: Paula Sullinger

Author Supplied Abstract: Salisbury University and the University of Maryland both undertook projects to evaluate the effectiveness of EBSCO Information Service's Usage Consolidation product and the usefulness of the data extracted for collection development decisions. The goals of implementation were to centralize the collection and analysis of e-resource usage data and to allow collection management librarians easy access to usage and cost per use data to aid in their decision-making. The presenters will discuss how staff at each institution populated Usage Consolidation and presented usage reports to collection managers; how collection managers responded to the data; and how they used the data to inform collection management decisions.

Mark Hemhauser and Rebecca Kemp from the University of Maryland, College Park (UMCO) and Leigh Ann DePope from Salisbury University shared their experiences using EBSCO's Usage Consolidation (EUC) service. They described the process of populating the service, which can be laborious. Fortunately, many of the journal platforms are pre-populated. For each platform, the librarians enter the statistics URL, the username/password, optional notes about the platform or its statistics, and select the desired reports. The librarian loads usage reports in EUC manually if the library doesn't use SUSHI. For instance, UMCP tried EUC and it worked well for some resources but not all. When reports are run an exception list is generated for titles that can't be matched to payments. The first reporting cycle produced many exceptions. They worked to resolve the linking issues and each time the report is run the exception list gets shorter.

UMCP wanted to keep aggregator usage separate from their direct content, and EUC accommodates this workflow. All three librarians spoke about the care that must be taken to ensure you are viewing Year X's cost data and the Year X usage data at the same time. Then they demonstrated some of the reports that EUC can produce for particular titles, by publisher, and the entire list of titles. EUC can only produce the report for titles subscribed through EBSCO; other titles must be manually added to the results. Since a vast majority of both institutions' subscriptions are with EBSCO this was not a significant issue for them.

When Hemhauser and Kemp presented the results at UMCP, the subject librarians reported that they liked seeing the cost and usage data in one place, though they didn't like all of the interface features. They also thought the information would be useful for serials review projects. The results were positive enough that UMCP will continue to use the product.

At Salisbury, this was the first attempt to gather usage data. Their librarians found the information to be overwhelming and cumbersome at first. After DePope presented results by subject areas there was greater acceptance. Salisbury will continue to collect usage data since the administration appreciated the usage data.

About the Presenters

Leigh Ann DePope is the Serials/Electronic Services Librarian at Salisbury University. She is responsible for all aspects of serials and electronic resource management. She has serials experience in both public and academic libraries. Leigh Ann has earned her MLS from Clarion University of Pennsylvania and a BA from the Pennsylvania State University.

Mark Hemhauser has 18 years of experience managing serials acquisitions and is currently the Systems Librarian for the Aleph Acquisitions and Serials module at the University System of Maryland and Affiliated Institutions. He also serves on the e-Acquisitions Team of the Kuali OLE (Open Library Environment) project--an open-source, library-driven project to build a truly integrated library system

Rebecca Kemp is the Continuing Resources Librarian at University of Maryland, College Park. She has served as a continuing resources librarian since

2004, has served on national library association committees, and has participated in a variety of state and national conferences.

Collaboration in a Time of Change

Daryl Yang, Imperial College London, London, UK

Reported by: Marsha Seamans

Author Supplied Abstract: The landscape of libraries' print collection has changed significantly over the past decades. On an institutional level, libraries need to evaluate available resources, local researchers' needs, and find the right balance between print and electronic material in order to support parent institutions' development and growth. On a national level, we have seen different schemes being developed in several countries to support libraries' activities in a time of change. There is no doubt that print materials are being disposed of at an industrial level. When more and more libraries are transitioning into E-only, what's the impact of losing print? Collaboration and coordination regarding print disposal tend to take place on a regional level (e.g. peer-to-peer network) or nationally (e.g. repository libraries, UK Research Reserve), but what about working on an international level? Through my presentation, I'd like to explore relevant issues and share our experience so far.

Daryl Yang, UK Research Reserve (UKRR) Manager reported on the work being done to create a collaborative distributed national research collection. The objectives of the UKRR include de-duplicating low use materials (journals), releasing space to realize savings and efficiencies, and preserving materials and providing access for researchers.

Yang provided the context for establishing the UKRR by stressing the importance of collaboration to commercial success, innovation, synergy and efficiency. In libraries, we have material cluttering physical spaces, and there is growing pressure on space as our institutions expand.

Print journals are still relevant for in-depth reading and especially needed in the humanities and social sciences where electronic resources are not predominant.

In order for the project to be successful it was necessary to create a cultural change towards accepting access over ownership. The UKRR was formed as a strategic partnership between the Higher Education sector and the British Library, with funding coming from the Higher Education Funding Council of England.

In phase one, which was an 18-month pilot project (2007-2008) with 8 higher education libraries participating, over 11,000 meters of shelf space was released through de-duplication. Phase two includes 29 libraries from Scotland, Wales and England in partnership with the British Library and is funded through 2015 with the goal of releasing 100 kilometers of shelf space.

For the future, the UKRR has begun to look at other European initiatives and at the overlap between the UKRR and other repositories. Yang concluded by emphasizing that libraries provide a key link between researchers and the pursuit of knowledge, and print repositories provide the safety net to keep that knowledge accessible.

About the Presenter

Daryl Yang is the UK Research Reserve Manager based at Imperial College London, UK. UK Research Reserve (UKRR) is a £10m national collaborative scheme that aims to tackle issues surrounding low-use print journals and Daryl works closely with a range of stakeholders, partners, and sponsors. Before joining UKRR, Daryl worked as a consultant at Arthur Andersen. She also has extensive experience in the HE sector; she was a university lecturer in business management, and has managed an international research centre in management and a wide range of projects. She also helped operate family business during a time of change and expand it to new markets.

In Daryl's free time, she enjoys people watching, cycling, travelling, and dancing.

Creation, Transformation, Dissemination and Preservation: Advocating for Scholarly Communication (For Academic and Special Libraries)

Anne McKee, Greater Western Library Alliance
Christine M. Stamison, Swets, Addison, IL

Reported by: Rachel Lundberg

Author Supplied Abstract: As the fight for research grants intensifies and the pot of money decreases, librarians need to ensure that the topic of scholarly communication remains at the forefront, regardless of funding. Affording researchers avenues to widely share and publish their work and to make it widely available should be a mission both in the library and at the highest levels of the institution. How can libraries make an impact? In this presentation two librarians, a consortia officer and a vendor, will discuss how consortia have and continue to play a primary role in advocating for dissemination of information and scholarly communication. Additionally, they will discuss other tools that libraries/researchers can use as a method of collaboration, whether regional or international, and why it is essential for libraries to become part of the solution before they are left out in the cold. Please come prepared to discuss how your library is making an impact on this topic.

Christine Stamison and Anne McKee covered how academic librarians can add value to the scholarly communication process.

Energetically, Stamison started the session by covering creation and transformation phases of scholarly communication. She noted the current trend of multiple authors collaborating across multiple institutions (local and international) using social networking tools. For instance, 60% of publications are co-authored, 88% of articles are co-authored, and publications from emerging nations are increasing. Librarians should provide and support social networking tools, as well as support the research process by identifying research opportunities and potential research collaborators. Stamison compared three reference management tools (Endnote, Mendeley, and Zotero) to show how they support creation and collaboration. All three offer private groups and have mobile applications. Mendeley and Zotero offer open groups, social networks, and news feeds. Stamison remarked that product features are not always visible on websites; some sleuthing has to be done.

McKee touched on issues such as guest access (eduroam), improved access to affordable textbooks (Educause), and knowledge sharing (Force11). McKee also spoke about open access publishing initiatives: GWLA+GPN, SCOAP3, Science Europe. She also provided examples of consortia dissemination and preservation initiatives, including those for: Interlibrary loan (OCCUMS reader), monograph and serials (HathiTrust), shared journal repository (WEST), scientific research (BioOne), government technical reports (TRAIL), water resources (Western Waters), and federally funded research (CHORUS).

McKee then discussed the ARL's Spec Kit 332 , which found that while many libraries offered advice on copyright and retaining rights, only 25% of advisors have law degrees, or have attended a course on copyright. Libraries have no definitive leadership claim in scholarly communication, and even when the library is the only scholarly communication service provider in the institution, they are still not seen as the leader. McKee advocated for librarians to take the lead on scholarly communication, and to receive more training on copyright.

The presentation provoked discussion on a number of relevant questions. For example, who should lead scholarly communication in the library -- an academic or a librarian? What qualifying factors should have more sway—the academic prestige of candidates and their access to academic social networks? How can librarians impact researchers' reputations and tenure prospects?

Should librarians provide warnings about predatory journal or leave this to researchers' peers?

Attendees also commented that faculty expect librarians to host data, manage data sets, as well as do liaison work. Some university libraries have grant officers that provide grants to authors, as well as roadshows to promote their scholarly communications services.

Scholarly communication librarianship is expected to grow in the same way as subject liaison librarianship. Librarians can add value to their institutions by going beyond traditional services and taking the lead by inserting themselves into the research process.

About the Presenters

Anne McKee is the Program Officer for Resource for the Greater Western Library Alliance. McKee received her M.L.S. from Indiana University, Bloomington and has had a very diverse career in librarianship. She has been an academic librarian, a sales rep for two subscription agencies and now a consortium officer for the past 13 years. A former President of NASIG, McKee is on the *Serials Review* Editorial Board, three publisher/vendor library advisory boards, and strives to balance a busy career with an *even* busier family, including a husband, one high-schooler, one middle-schooler, and two dogs, while being a first year newbie [and admittedly a rather bewildered] club volleyball mom: all this, including wearing orthodontia! McKee is probably the only person you'll meet with both undergrad AND graduate degrees in Library Science.

Christine Stamison, senior customer relations manager for Swets, has worked in various positions in the subscription agent industry for the past twenty years. Previously, she worked for thirteen years in academic libraries, primarily in serials, at both the University of Illinois at Chicago and at the University of Chicago Libraries. Christine received her Master's in Library and

Information Services from Rosary College (now Dominican University) and is a regular lecturer for serials, collection development, and technical services classes. When not working, you can find Christine in the gym working with her trainer, trying to get in shape for her upcoming vacation hiking up Machu Picchu and trekking around Easter Island.

Discovering Music:
Small-scale, Web-scale, Facets, and Beyond

Rebecca Belford, University at Buffalo
Tracey Snyder, Cornell University

Reported by Patrick L. Carr

Web-scale discovery tools are currently transforming the interfaces libraries provide for the discovery and access of their collections. Although these tools are significantly enhancing user experiences, they are also introducing new challenges. The concurrent session "Discovering Music: Small-scale, Web-scale, Facets, and Beyond" examined one such challenge: the unique difficulties of organizing and searching for music materials (e.g., scores, sheet music, and recordings) in a web-scale environment.

In the session's first presentation, Rebecca Belford (music cataloger/reference librarian) provided an overview of some of the specific complexities that make the discovery of music materials problematic in web-scale discovery interfaces. She noted that these complexities should be of interest to anyone engaged with the challenges of library collection discovery because music materials measure how well discovery tools function at the extremes; in other words, a discovery tool that works well for music materials will also work well for most other library materials. Next, Belford discussed how the Music Library Association's Music Discovery Requirements document (http://goo.gl/FQk2U) aims to address these complexities. As she explained, this document, which was released in April 2012, provides a range of best practices and recommendations detailing the characteristics of music materials and providing

guidance regarding how the administrators of web-discovery tools can harness AACR2 and RDA standards within the MARC record format to maximize the discoverability of music materials. The document has a FRBR-like structure, and Belford's presentation devoted particular attention to discussing the ramifications of music formats and works within the discovery context, including the navigation between different manifestations of the same work. Finally, Belford highlighted some significant developments in music discovery occurring outside of the traditional library environment, including the application of FRBR principles at the Australian Music Centre.

The session's second presenter, Tracey Snyder (assistant music librarian), considered the discoverability of music materials within the specific discovery interfaces being developed and implemented at Cornell University. After reviewing Cornell's current discovery interfaces, Snyder described the university's efforts to implement the faceted open source discovery layer, Blacklight, as their main catalog interface; Cornell aims to have a beta release accessible to patrons during the 2013/2014 academic year. Snyder is a member of the Blacklight implementation team and is playing a particular role as an advocate for the effective discovery of music materials. She worked with patrons to conduct usability testing for music materials, and, in doing so, she was able to identify strengths and weaknesses related to the discovery of music materials via the Blacklight interface. Collaborating with other members of the implementation team, she was able to address certain problems identified in the usability testing, but resolutions to other problems are still in progress. Snyder concluded by noting some directions for the future development of music discoverability, including work by the Library of Congress, in cooperation with the Music Library Association, incorporating RDA elements in order to achieve more granularity in search results and creating thesauri for genre/form and medium of performance.

Diversification of Access Pathways and the Role of Demand Driven Acquisition

Mark England, University of Utah
Phill Jones, Labtiva, Inc.

Reported by: Heather Barrett

Author Supplied Abstract: The combined influence of rapidly changing technology and the economic downturn has forced librarians and publishers to reassess their respective roles in the delivery of information. Many are realizing that the costs of traditional collection management through journal subscriptions and particularly the 'Big Deal' are not only burdensome but unsustainable. The result of these forces will likely be continuing diversification in access models, with institutions acquiring content through subscriptions, aggregators, demand driven acquisition, document delivery, and repositories. Increased complexity in business models and the high cost of information will bring increasing need for careful evaluation and analysis of financial efficiencies. The obvious place for such analysis to occur is in the library.

Demand Driven Acquisition offers inherent cost savings for libraries, as the library only pays for the content that is read. In this session, we will describe a trial of a demand driven service, designed by the technology company Labtiva, and executed in partnership between the University of Utah and Nature publishing Group. The goals of the project are to provide instantaneous access to content for patrons, while providing the means for just-in-time delivery, at a reduced cost per usage.

Mark England and Phill Jones spoke about the increasing difficulty libraries have sustaining electronic journal subscriptions in light of price increases and budget decreases, as well as some alternative methods for providing access to e-journals. England reported that serials costs for his library had increased 16 percent last year, even after cancelling over 240 journals. He decided to examine whether a demand-driven

acquisition model might help to cut costs without compromising patron access to journal articles.

ReadCube (http://www.readcube.com/access?locale=en) is a content delivery platform for academic journals that was developed by Labtiva in 2011. ReadCube Access delivers article content on a pay-per use basis on a platform that is free, transparent, and seamless to the end user. A recent survey conducted by ReadCube found that users of academic journals hit about three access barriers per month. When researchers are not able to access the article they need, 27% will give up or find an alternative article, 25% will request an interlibrary loan, and less than 4% will purchase access to an article from the publisher. 40% of researchers will seek the article from a source independent of any library or publisher, be it directly from the author, from a colleague who has access elsewhere, or from an online file-sharing source. This poses problems for both libraries and publishers: the library is unaware that the material is in demand from the patrons, and the publishers lose income. Demand-driven acquisition could reverse this trend of library and publisher disintermediation. DDA can be less expensive than subscriptions or ILL for low-use journals and will save the library money if low use subscriptions are canceled. Publishers will also receive due payment for use of their materials.

England decided to set up a trial with ReadCube Access to assess whether demand driven acquisition would result in any unsustainable over-usage levels, to compare researcher preferences for ReadCube versus ILL, and to compare the costs of ReadCube and ILL. He found that ReadCube Access usage is comparable to ILL usage and that it is more cost-effective than ILL. He received positive feedback from patrons about the immediacy of article access and the efficiency and ease of use of the ReadCube platform. Some negative feedback was received about the digital rights management which does not allow the user to print, share, or store articles outside of ReadCube and rudimentary search capabilities.

Currently, ReadCube Access is limited to Nature Press content, however Jones reported that they are in negotiations with additional publishers and that they intend to expand their subject coverage to social sciences and humanities. They are working on ReadCube Access 2 with an advisory committee that includes libraries and consortia. The new version of ReadCube Access will provide improved search capabilities, new pricing tiers and access options, including the ability to print and to view articles in a variety of PDF readers. It will also ensure that libraries are charged only for access to unsubscribed content. The long-term vision for ReadCube Access is toward a cross-publisher demand-driven acquisition platform for articles, operated on an iTunes-like business model.

Both England and Jones see demand-driven acquisition as being just one of a diverse range of journal article access methods, along with subscriptions, big deals, open access, and ILL.

About the Presenters

Phill Jones is the VP for Business Development at Labtiva, Inc. He came to Labtiva from the video journal JoVE, where he held the position of Editorial Director. Prior to that, he had a diverse academic career spanning bio-physics, microscopy, and atomic physics. In addition to his work at Labtiva, Phill currently holds a faculty appointment at Harvard Medical School and also works as a microscopy consultant.

The End of Nostradamus: Killing Predictive Check in without Feeling Guilty

Young Joo Moon, Boston College Libraries
Bob Persing, University of Pennsylvania Library

Reported by: Carrie Doyle

Author Supplied Abstract: In the 1980s and 1990s, ILS software took the next step forward in serial check in: fully-predictive check in systems, which told you exactly what you were going to receive and when. The idea was that check in would take only seconds per issue, and the software would do almost all the work for you. Predictive data would be shared universally, eliminating duplicative work at each library. Standards work and new MARC tags would facilitate data interchange. In the 2010s, the next generation of ILSes is emerging, and predictive check in isn't being included in most of them. What happened to dim the promise of prediction? What sorts of systems are being developed to replace it?

The presentation started with a history of predictive serials systems through the decades that was both entertaining and informative, especially for those of us new to serials. From the Kardex, computer punch cards, and union lists, to predictive systems like NOTIS, VTLS, and FAXON SC-10, Bob led the audience through a history of standards and systems that brought back memories, both fond and not so fond. Fully-predictive check in systems promised to make check in quick and easy since the software did most of the work. However, later system development focused less on predictive check in and more on electronic resource management and knowledgebases. In fact, many of the next generation ILSes don't even include predictive checkin. Is this development cause for concern?

Some serials librarians are clearly skeptical. The presenters provided case studies of two current generation systems that do not include predictive checkin: ALMA and Kuali OLE. The upshot seems to be that losing predictive checkin is not the end of the world, and in fact can free staff time by eliminating the

need to maintain patterns. Staff will still need to catch missing issues and claim when needed.

Boston College has been an ALMA development partner since 2009 and was the first institution to migrate to ALMA, in June 2012. ALMA is a workflow-driven solution that focuses on unified resource management of all of a library's resources, regardless of format or location. Access is browser-based and is provided by a discovery layer (Primo) that sits on top of the URM (Unified Resource Management). ALMA can handle multiple metadata formats, including MARC, MODS and Dublin Core. ALMA is cloud-based, and libraries experience less downtime due to maintenance. Ex Libris does all the maintenance, which could mean no week-long upgrade ordeals for systems librarians. ALMA also replaces individual data silos like the ILS, the Electronic Resource Management System and link resolver; all services are integrated into the one system. Young Joo Moon showed us several screen shots of how check in works and provided explanations of how ALMA handles different types of publications, like monographic standing orders. ALMA considers "serials check in" as "receiving physical items."

Boston College has found that using ALMA saves staff time, which has enabled restructuring and refocusing of staff duties.

Information about Kuali OLE was presented by Bob Pershing, a Kuali OLE developer. Kuali OLE is an open source ILS implemented at several institutions, including Duke, University of Pennsylvania, and the University of Chicago. Like ALMA, Kuali OLE is web-based. It can handle different metadata formats and is intended to handle all formats equally, with no preference for tangible or electronic formats. The serials receiving component is not fully coded yet, but Bob showed us mockups. Serials receiving is designed to be free-standing; purchase orders will not be required to track the receipt of a title.

Kuali OLE developers considered three options for serials check in: passive receipt, where you record what you get; action-date-based receipt; and full prediction

with patterns. Ultimately, the second option was chosen. Full predictive check-in was not worth the trouble for the number (which is declining) of print titles still checked in and the work involved in maintaining patterns, but a trigger for claiming was still needed.

Despite the dramatic title of the presentation, both ALMA and Kuali OLE do offer serials check in solutions that involve some prediction of when the next issue will arrive. This prediction is not based on publication patterns, but on the subscription interval of the serial and the date the previous issue was checked in. This is similar to how NOTIS and other systems worked. While many law librarians, who still deal with many print-based and complicated continuation serials, are not pleased to lose the ability to create and use complex publication patterns, other librarians in attendance expressed relief that the systems do not drop check in altogether and overall seemed pleased with how the systems handle check-in. As Bob said, "NASIG is all about therapy."

About the Presenters

Young Joo Moon, Head of Continuing & Electronic Resources, Boston College, Oct. 2009 – Present | Head of Electronic Resources & Serials Unit, Georgetown University, Jan. 2004 – Oct. 2009 | University of North Carolina at Chapel Hill, M.S. in Library Science, 2001

Bob Persing currently serves as Kuali OLE Project Librarian for the University of Pennsylvania Library. Before that, he spent 20 years in Penn's serials department -- and before that, he held the job his co-presenter has now, managing serials for Boston College. He's been coming to the NASIG conference since 1991, and has served on PPC, N&E, ECC, D&D, Bylaws, Publications/PR, indexed the conference proceedings, and been a Board member-at-large

E-Resources Acquisition Checklist:
An Indispensable Tool for
Managing the Electronic Resource Lifecycle

Nate Hosburgh, Montana State University, Bozeman

Reported by: Rachel A. Erb

Author Supplied Abstract: One of the core functions of the electronic resources librarian consists of managing various stages of the electronic resource life cycle. In order to do this effectively, it is extremely helpful to have a detailed guide on hand. An E-Resources Acquisition Checklist can assist the librarian in covering all aspects of evaluation, acquisition, renewal, and cancellation of e-resources such as databases, e-books, e-journals, and more. Such a tool can be indispensable, especially for new librarians attempting to get a grasp on the logistics of electronic resources management.

Inspired by the TERMS (Techniques for ER Management) wiki project initiated by Jill Emery and Graham Stone, Hosburgh organized his presentation to illustrate how an e-resource checklist can be built using the TERMS framework as a model. Hosburgh is an active participant in the TERMS project as a co-editor on the TERMS wiki.

Checklists for managing e-resources are essential for several reasons. As workflows become even more complicated, checklists organize these workflows with the goal of greater efficiency. These processes are either managed by several individuals or departments—or even both. The checklist serves to foster effective communication among all involved in these processes. In addition, the checklist helps promote responsible stewardship, allowing libraries to demonstrate that money is spent wisely. Lastly, whether e-resources processes are either ongoing or cyclical, they are clearly are not linear. Checklists enable documenting iterative processes for defining workflows and evaluation of current procedures.

Hosburgh admits that he employs the term "checklist" rather loosely. One may use a checklist, but it can be in

any format that suits the needs of the organization. The medium employed does not necessarily have to be a Word document; relational databases, flowcharts, etc.--all are acceptable alternatives. Flowcharts are especially ideal for processes that are handled across departments. Moreover, other management systems such as customer relations management systems and process management systems may also be used in this capacity instead of the ERMS (Electronic Resource Management System).

The TERMS wiki offers a visual representation of the e-resources lifecycle. The circular graphic illustrates the iterative process of e-resources acquisitions and management. Each stage was closely examined: investigating new content, acquiring new content, implementation, ongoing evaluation and access, annual review, and cancellation. The stages are described in great detail on the TERMS wiki.

The TERMS wiki is a valuable tool for not only learning about the electronic resources lifecycle but also for providing a framework for electronic resources checklists. Hosburgh encouraged the audience to consider contributing to the ERMS wiki and simply contact one of the editors to find out how you may participate in this developing project.

About the Presenter

In June 2012, Nate Hosburgh transitioned from managing Interlibrary Loan & Document Delivery at Florida Institute of Technology, Melbourne to Electronic Resources Librarian at Montana State University, Bozeman. Along with a dramatic shift in latitude, this was a shift into a different area of librarianship with unique challenges and a unique workflow. Nate hopes to share some of the experience he has gained so far as well as continue to learn from experienced professionals in the field through listservs, conferences, and other networking opportunities.

EXPO-nential Success Redux
or If You Plan It, They will Come

Joann Janosko, Indiana University of Pennsylvania

Reported by: Kristin D'Amato

Author Supplied Abstract: An important aspect of the life cycle of electronic resources is disseminating the arrival of new resources on campus and reminding the campus of currently subscribed materials. A database page accessible by subject or topic or format, training sessions by vendors either live or via the web, information literacy presentations for one-shot classes or where the entire campus is invited are standard marketing strategies. However, even with clear and comprehensive presentations, demonstrating awareness of the strengths and limitations of subscribed resources, if only a handful of the 15,000+ users (on Indiana University of Pennsylvania's (IUP) campus) show up, the program may feel like an exercise in futility. Another route to disseminate this important information is the Library EXPO or Vendor Fair. Vendors set up booths for three to five hours to meet with users. They provide giveaways and help with door prizes to lure students, faculty and administrators to the fair. Users can spare a short time to browse the booths between classes and meetings to learn about new resources and ask questions about their old favorites. This program will provide insights into the planning, marketing and assessment of the Library EXPOs held at IUP.

Promoting new e-resources and highlighting subscribed material is an important part of the e-resources life cycle. In this session, Joann Janosko, Collection Development and E-Resources Librarian at Indiana University of Pennsylvania (IUP), presented the IUP Libraries' experience with holding a vendor fair. Janosko began the session by highlighting some of the traditional methods the IUP Libraries use to promote online resources, such as information literacy presentations, campus wide presentations, and vendor led training sessions. These approaches were not reaching enough people; one shot classes only connect

with a fraction of the student population and the attendance for the presentations and training sessions is consistently low. The inspiration for a new strategy sprung from a suggestion by a vendor, who had recently taken part in a vendor fair at another library. Janosko took this idea and turned it into the IUP Libraries' first Database Expo, an event that would invite several vendors to set up booths and provide presentations, offering students and faculty the opportunity to experience a number of the library's electronic resources at one convenient time.

Janosko initiated the project by making the initial vendor contacts and holding a library planning meeting. The vendors agreed to provide door prizes and help with the cost of refreshments. To help manage the process, library volunteers were matched up with vendors to help manage any matters related to the event. During the planning phase, Janosko noted that their Dean was instrumental in the success of this endeavor by involving more library personnel, agreeing to subsidize the cost of the snacks, and sponsor a vendor luncheon to thank them for their service.

The first Database Expo was held in October 2010. Eight vendors participated in the event held in the library. The event was heavily advertised, both in the library and on campus. In addition to the vendor booths, training sessions were offered throughout the day. A library table was set up to answer questions about the Expo and to manage prize entries and surveys. To win prizes, participants had to visit several booths, where vendors checked off their company on a raffle ticket. A survey was also distributed, which offered another opportunity to win an iPod shuffle. The first Library Expo drew 101 participants, including the Provost and the Director of IT. Of these participants, twenty-three took part in the training sessions.

A second Expo was held in April 2012, from 10am to 1pm, with ten vendors participating. Suggestions from the 2010 surveys helped to determine which vendors to invite. Due to the lack of participation in the first Expo, the training sessions were discontinued. Time was conjectured to be the cause of low participation rates;

patrons had the time to walk through the Expo, but not enough time to attend an hour long presentation. This time, access was restricted to the IUP community by requiring an IUP email address for the raffles. The event produced 103 participants and more positive reviews from the surveys.

The Database Expos were found to be a successful means of promoting the library's e-resources. The steady turnout and the informative feedback from the surveys encouraged the librarians to continue to employ this strategy, however, it was decided that for future events the planning would need to happen sooner and would need to involve more staff. Another goal for future events will be to increase faculty involvement. A college technology fair and new faculty orientation in the fall will offer opportunities for library participation and the librarians at IUP are planning on presenting six sessions with three vendors.

About the Presenter

Joann Janosko is Associate Professor and Collection Development/Electronic Resources Librarian at Indiana University of Pennsylvania [IUP] where she was awarded tenure in 2005. She holds and M.L.S. from University of Pittsburgh (1990). She was inducted into the University of Pittsburgh's PI Chapter of Beta Phi Mu, the national honor society for library science, in 1990 and served as chair of Pi Chapter in 1997-8. She is also a member of ALA, ACRL, WPWVC/ACRL, LITA, NASIG, and PaLA [Pennsylvania Library Association]. During her tenure at IUP, she served as Acquisitions/Serials Librarian, during which time she automated many of the acquisition workflows to include web-based functionality: online ordering, using EDI to process both serial and monographic invoices, and implementing PromptCat MARC record delivery from OCLC, now to include e-book records. Her title eventually changed to Serials/Electronic Resources Librarian and then to her current title. During that time the e-resources offerings at IUP expanded from just under fifty to almost 300 current database titles spanning e-books, e-journals, A & I services and streaming video services. Prior to her work at IUP she served as Systems and Periodicals

Librarian at Seton Hill College in Greensburg, PA (1987-2000).

From Print to Online: Revamping Technical Services with Distributed and Centralized Workflows Models

Christine Korytnyk Dulaney, Pence Law Library, American University
Kari Schmidt, American University Library

Reported by: Barry J. Gray

Author Supplied Abstract: In order to improve patron access to the library's collection of electronic resources, upgrade staff competencies for working with electronic resources, and enhance workflow efficiencies, both the Technical Services Department of American University's Pence Law Library and the Information Delivery Services division at American University's Bender Library implemented reorganizations. These two libraries, however, chose different organizational models. The law library redefined itself through a distributed model using existing staff. In contrast, the Bender Library formed a centralized Electronic Resource Management Unit to better manage access to and discovery of the electronic resource collection. The presenters will examine the successes and challenges of revising workflows, reassigning tasks, and redistributing print-based work to address the growing needs of electronic collections and diminished volume of print materials in both a centralized and distributed model. This program also provides an overview of project management techniques and how these techniques were implemented and supplemented in order to evolve the skills of the staff at both libraries. The program will also provide an overview of how a new vision and new goals were crafted; how workflows were reviewed and revised; and how jobs were rewritten and reassigned. In addition, the presenters will address shared challenges with current workflows and organizational structures. The intended audience is librarians in smaller to mid-sized libraries who do not have a librarian or department dedicated to electronic resources but who need to tackle electronic resources workflows and

evolve staff's print-based skills to accommodate electronic resource workflows.

Kari Schmidt is the Electronic Resources Librarian and Co-Interim Director for Information Delivery Services at American University's Bender Library. Christine Dulaney is the Associate Law Librarian for Technical and Metadata Services at American University's Pence Law Library. While each library operates independently, both libraries' technical services departments were recently reorganized, in part to better manage electronic resources.

In Schmidt's case, she was put in charge of a new unit, called "Information Delivery Services," that has centralized all e-resource duties separately from the rest of technical services. While she was able to hire new employees and train them to work specifically with e-resources, the proliferation of these resources has left them with the sense they cannot keep up without distributing some of the work to other technical services staff.

Dulaney compared the traditional print workflow to that for electronic resources. She characterized the former as routine, predictable and linear; while the latter is experimental, highly unpredictable, and cyclical. She adapted the engineering field's principles of project management to achieve the goals of reorganization. The highlight of her presentation was literally the unrolling a six-foot high, color-coded activity chart that allowed her department to identify duties which were not clearly assigned, as well as areas of overlapping duties.

Dulaney seems more hopeful about the success of the distributed model at her library than Schmidt is about the more centralized method. The answer to whether a centralized or distributed model is better for electronic resource management may not have as much to do with project management as do the attitudes of those currently working in technical services. Many libraries are unable to hire new staff to manage electronic resources. Therefore, they must decide to disinvest in

print serial management or invest in electronic resource management

Both Schmidt and Dulaney recognize the external threats to library technical services, especially as academic libraries redesign their space for new uses. The presenters credit their staffs with the willingness to cope with the uncertainties inherent in electronic resources. They both have tried to demonstrate the significance of what they do to the rest of the library and the campus community, so that, as Dulaney said at the conclusion of her presentation, technical services are still seen as relevant, because nobody else can handle data better than they do. Schmidt reiterated during the Q&A that we need to show the rest of the library that the work technical services does is not "mysterious."

About the Presenters
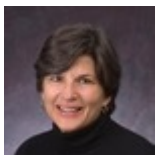
Christine Dulaney is currently the Associate Law Librarian for Technical and Metadata Services at the Pence Law Library of American University in Washington, DC. In both her current position as well as in her previous position as Head of Technical Services in at the Congressional Research Service of the Library of Congress, Christine has managed staff reorganizations as these library collections transitioned from print to online formats. Christine has also held the position of Head of Technical Services at Catholic University Law Library as well as Head of Acquisitions and Serials at George Washington University Law Library. In addition, Christine has published and presented at conferences on the topic of managing technical services as well as implementation of discovery layers. An active member of both ALA and AALL, Christine participates on several committees including the ALCTS International Relations Committee as well as the CONELL committee of AALL.

Kari Schmidt is currently the E-Resources Librarian & Co-Interim Director for Information Delivery Services at American University Library in Washington, DC. In these roles she is responsible for the Electronic Resource Management Unit, Resource Description Unit, and Acquisitions Unit at the Library. Kari has extensive experience managing electronic resources. Her previous positions include Electronic Resources Librarian at the University System of Maryland as well as Collection Management and Electronic Resources Librarian for the Georgetown University Medical Center Library. As co-author of the monograph *Electronic Resource Management: Practical Perspectives in a New Technical Services Model*, as well as many articles about electronic resources and the changing nature of library collections, Kari's expertise in this area is widely recognized.

From Record Bound to Boundless: FRBR, Linked Data, and New Possibilities for Serials Cataloging

Marlene van Ballegooie, University of Toronto Libraries
Juliya Borie, University of Toronto Libraries

Reported by: Heidy Berthoud

Author Supplied Abstract: As resources have become ever more complicated in a digital world, it is evident that cataloging practices and the metadata standards used to guide these practices are becoming more constrained. Nowhere is this more apparent than with the cataloging of serial publications. For librarians, serial publications have been a constant challenge due to issues such as the multiple version problem, frequent changes in title or issuing body, and complex publication histories. For users, serial publications are challenging due to the boundary that has been established in the library profession where serial publications are described by librarians, while the articles contained within those publications are handled by indexing and abstracting services. Although web-scale discovery systems have attempted to bridge the gap by providing a single point of discovery, user access is far from seamless. Recent changes within the library community can have a significant impact on serials cataloging and may help improve information retrieval for the end user. The Functional Requirements for Bibliographic Records (FRBR) holds great promise for

alleviating some of the problems related to serials cataloging. While FRBR provides a useful mechanism for re-examining many of the problems with serials cataloging, the principles of Linked Data may further transform the way in which resources and the relationships between them are captured and presented to our users. By taking description out of current record constraints, serials librarians will better be able to express how a particular journal has changed over time and the relationships between multiple versions of the same publication. The Linked Data model also opens up many opportunities for the provision of value-added content to bibliographic descriptions. Shifting description to a Linked Data model may not only help to alleviate many of the issues related to serials cataloging, it can also help users better understand and use bibliographic data effectively.

Marlene van Ballegooie and Juliya Borie of the University of Toronto presented "From record bound to boundless: FRBR, linked data, and new possibilities for serials cataloging." Van Ballegooie and Borie describe the current "record-bound" world of serials cataloging, which is sadly out of sync with the FRBR entity model. Some of this disconnect is due to the limitation of the MARC schema. MARC records are static and inflexible; they cannot adequately describe relationships between FRBR groups and entities, and semantic meaning can only be derived within the context of the whole record. Some of this disconnect also stems from difficulties in modeling challenges faced when mapping serials onto FRBR.

However, it is not just FRBR that is revealing weaknesses in this current record-bound system. Technology is racing ahead, and MARC records cannot keep pace. The woes of the record-bound state can be illustrated by the difficulties in finding serial articles using current discovery tools. Van Ballegooie and Borie point out that this is because there are two levels of metadata at work here: the serial level metadata, encapsulated in our MARC records, and the article level metadata, provided by abstracting and indexing tools. These two levels of metadata don't always work well

together and the connections between one level and another are often unclear.

Van Ballegooie and Borie point to the Library of Congress' Bibliographic Framework Initiation (Bibframe), and how it enables a complete reimagining of the bibliographic environment in a post-MARC world. Bibframe is relatively new and not without its own challenges, but the possibilities it offers could provide a number of benefits both for librarians and patrons. Instead of storing data in a static record, Bibframe leverages semantic web technologies to expose data using a linked data model. Because linked data does not exist in a closed system but is essentially "boundless," it better realizes many of the aims of FRBR, particularly in its ability to make connections and relationships between entities. Van Ballegooie and Borie predict the shift to linked data from MARC could either solve or clarify a number of problems currently faced when describing serials, including the journal/article divide, clear linking of publication history, and clear descriptions of multiple versions. The presenters describe this shift as moving from cataloging to "catalinking."

The use of linked data in serials cataloging also has added benefits for patrons. Van Ballegooie and Borie posit that linked data, and the rich relationships it enables, will allow patrons to find more resources serendipitously, as collections will be more visible, discoverable and much less siloed. Leveraging web technologies will also provide catalogers new opportunities to link from titles to supplementary web materials, like data sets and multi-media supplements.

About the Presenters

Marlene van Ballegooie is the metadata librarian at the University of Toronto Libraries. She received her MISt degree at the Faculty of Information Studies, University of Toronto. Marlene has written several articles and presented at conferences on the topics of library metadata, digital collections, and the semantic web. Her primary research interests include: Linked Data,

metadata interoperability, and methods and tools for automated metadata generation.

Juliya Borie is a cataloguing librarian at the University of Toronto Libraries. She holds an Honours BA in French and English, a B.Ed from York University (Toronto) and a MISt from the University of Toronto. She specializes in providing access to serials as well as monographs in Western European languages. She also contributes to reference services at the Robarts Library at University of Toronto. Her research interests include cataloguing training and users' information-seeking behavior.

Fundamentals of E-Resource Licensing

Claire Dygert, Florida Virtual Campus

Reported by: Jeanne M. Langendorfer

Author Supplied Abstract: This program will explore the role of license agreements in the e-resource environment, and detail best practices for creating agreements that protect the rights of users and libraries. Following a discussion of the legal framework for licensing, the session leader will walk the attendees through a typical license agreement and discuss the issues that various sections and clauses may present, including those that might be encountered in a consortial vs. single institution environment. The "Florida Virtual Campus Guidelines for E-Resource Licensing," developed in conjunction with an intellectual property specialist lawyer at the University of Florida, will serve as a backbone to this discussion. The session will close with some practicalities for reviewing and editing license agreements, creating schedules and addenda that cover additional terms and requirements not generally part of a standard agreement, and tips for successfully negotiating terms with vendors.

This program covered basic best practices for creating or amending license agreements for electronic resources that protect the rights of users and libraries. Claire Dygert, Assistant Director for Licensing and E-Resources, Florida Virtual Campus, presented key

components of a license agreement, including sample clauses that draw upon the *Florida Virtual Campus Guidelines for E-Resource License Agreements*. https://fclaweb.fcla.edu/uploads/FLVC_Licensing_Guidelines_Version_III_Final.pdf

To ground our understanding of the need for well-written license agreements, Dygert briefly explained U.S. Copyright Law; the First-sale Doctrine that lets libraries lend, sell, and discard material; and Fair Use that allows for reproduction of a work for specific uses as well as the four factors that must be considered to meet the guidelines of Fair Use, and the exceptions allowed for libraries.

Contract law takes precedence over the existing rights and exceptions granted by Copyright Law. Therefore, it is critical to shape license agreements that protect users and libraries by retaining rights and exceptions allowed in Copyright Law. License agreements define the terms of the use that can be made of the resource and the obligations of the licensee and licensor.

Dygert encouraged attendees to not be afraid, intimidated, or hesitant when approaching licensing workflows. Each library should develop local licensing guidelines by considering your library's needs and by consulting the work of others. Requesting an editable copy of the license agreement early in the acquisitions process is advisable and it is important to comport yourself as though your changes to the agreement will be accepted by the vendor.

Develop a support network of local expertise. The experience and knowledge of staff in your institutional purchasing office and office of legal counsel may be particularly valuable. Help educate those who sign license agreements to understand the critical library issues that are part of a license agreement. Use the LIBLICENSE listserv, a forum for discussing licensing issues, as it is a great source for providing information about licensing. http://liblicense.crl.edu/ The major part of the presentation described the anatomy of a license agreement. Dygert reminded

participants to work with your office of general counsel (or other appropriate authority) so that your license agreements represent your institution in the way your institution wishes to be represented. Typical parts of a license agreement include a description of "licensor" and "licensee," a glossary of terms, definitions of authorized users, authorized site, authorized uses, licensor responsibilities, licensee responsibilities, and mutual obligations, legal issues (governing law, indemnification, etc.), and schedules and amendments.

The audience was reminded to consider SERU (Shared Electronic Resource Understanding) instead of traditional license agreements.
http://www.niso.org/workrooms/seru

To wrap up the presentation, Dygert offered some negotiation tips. Help your colleagues and your administrators understand the process and set your expectations high. Always be aware of deal-breakers and use them to help you get the resources needed for your users. Lastly, refer back to established guidelines and practices to help you make the case that your needs reflect the practice and policy of the institution.

About the Presenters

Claire currently serves as Assistant Director for Licensing and E-Resources for the Florida Virtual Campus (FLVC). Claire's responsibilities include licensing and managing the FLVC funded databases licensed on behalf of the eleven state universities and twenty eight colleges of Florida, as well as negotiating e-journal packages and other shared e-resource deals paid for by the libraries themselves. One of Claire's major efforts has been working with the Independent Colleges and Universities of Florida and the Florida College System to build collaborative licensing efforts various educational systems in the state. Prior to coming to FLVC, Claire worked at American University in Washington DC where she served as Department Head for E-resources and Serials. Claire's current professional activities include serving on the editorial board of the Journal of Interlibrary Loan, Document Delivery and Electronic

Reserve, and as a board member of the Florida Chapter of the Association of College and Research Libraries.

Getting to the Core of the Matter: Competencies for New E-Resources Librarians

Roën Janyk, Okanagan College
Emma Lawson, Langara College

Reported by: Heidy Berthoud

Author Supplied Abstract: As the amount of content created and acquired in electronic format continues to increase, establishing the knowledge and skills necessary for the job is essential for electronic resources librarians. New librarians are entering this emerging field, but are they well equipped to perform the duties of an electronic resources librarian? Two librarians share their experiences transitioning from the world of library school to applied work experience as electronic resources librarians. What gaps arose in their knowledge, and what training could have been useful? Using NASIG's Core Competencies for Electronic Resources Librarians as a guide, the presenters will discuss what they learned in library school, what they learned on the job, and how library schools and organizations can better prepare e-resources librarians for the future.

Roën Janyk, web services librarian at Okanagan College, and Emma Lawson, electronic resources librarian at Langara College, presented "Getting to the core of the matter: competencies for new e-resources librarians." Janyk and Lawson began by introducing themselves and briefly discussing their various job responsibilities, including acquisitions, licensing, negotiation, access, troubleshooting, knowledgebase management, holdings, record batch-loading, and many other areas. Janyk and Lawson then spoke about each of the NASIG Core Competencies for Electronic Resources Librarians in-depth, demonstrating what job tasks matched up with each competency, what coursework they had completed to support each competency in library school, and what, if any, roadblocks existed that affected mastery of each competency.

After reviewing each competency, Janyk and Lawson made a number of recommendations on how to better prepare new e-resources librarians. Many of these recommendations pertained to relevant library school coursework, as Janyk and Lawson highlighted a disconnect between coursework and the day-to-day tasks of many e-resources librarians. These recommendations included more hands on activities, possibly through partnerships with library schools and vendors, constant curriculum evaluation to make courses current and relevant, more teaching of relevant technologies, or publicizing of useful courses in other departments, more courses geared specifically toward e-resources management, licensing, contracts, negotiations and vendor relations, and more collection development courses that were specific to selecting and curating e-resources. Janyk and Lawson also called for several changes that can be promoted by e-resources professionals, such as cross-training in the workplace, promotion of e-resources as a career path, and more e-resources professional opportunities at conferences.

About the Presenters

Roën Janyk is the web services librarian at Okanagan College in Kelowna, B.C. She received her MLIS three years ago from the iSchool at UBC.

Emma Lawson is the electronic resources librarian at Langara College in Vancouver, B.C. She received a MA from the University of Toronto in 2008 and a MLIS from the iSchool at UBC in 2010.

Library Reorganization, Chaos, and Using the Core Competencies as a Guide

Clint Chamberlain, University of Texas at Arlington
Derek Reece, University of Texas at Arlington

Reported by: Heather Barrett

Author Supplied Abstract: Starting in the fall of 2012, the University of Texas at Arlington Library began planning a massive reorganization that would ultimately affect all areas of the library. This reorganization would change staffing levels, departmental structures, and job descriptions. During this time of change, the librarians and staff who worked with electronic resources used the Core Competencies document as a guide, both for training new staff and for making sure that the existing e-resources team didn't lose direction as change swirled around us. In our presentation, we will discuss how the team functioned prior to the reorganization, how we used the Core Competencies document as a guide to help ensure the team that emerged on the other side of the reorganization process was staffed with members who possessed all or most of the core competencies listed, and how the Core Competencies helped us guide the new team in developing needed skills and abilities. We will document the process, assess staff about e-resource competencies both before and after the reorganization, and present our findings.

Clint Chamberlain and Derek Reece spoke about NASIG's draft of The Core Competencies for Electronic Resources Librarians and their usefulness during UTA Library's current re-organization. Chamberlain and Reece, along with several library assistants, made up the library's serials and electronic resources team, one of many teams in an organizational model that has proven to be disjointed and inefficient. Despite discussion between teams, Chamberlain, Reece and their staff were often the last to learn about changes that heavily impacted their team, such as changes with the library's link resolver and proxy server. A "library expo" held early in the re-organization process, in which staff from each area gave a presentation on what they do, revealed that many staff had no idea what colleagues in other areas were doing.

The new dean of the library saw that a comprehensive re-organization of library staff and job positions was in order. The re-organization would affect all areas of the library and all staff apart from the dean, and the dean would make the final decisions about positions and staffing. In order to ease staff anxieties, each person was allowed to identify areas in which they were or were not interested.

A large part of the re-organization has been based on an inventory called Knowledge, Skills, Abilities, and Passions/Preferences (KSAP), which is used to better match staff aptitudes with positions. Chamberlain and Reece found that KSAP leaned heavily toward public service skills, so they used the NASIG draft core competencies to develop additional inventory items that would ensure that serials and electronic resources skills would be covered. Whenever possible, existing inventory items were mapped to the draft core competencies. Chamberlain and Reece found that it was helpful and more persuasive to the dean and other staff to base their recommendations and justify their needs upon an objective outside source.

Chamberlain and Reece reported that the KSAP results were still being analyzed and they were still not sure what their own positions would be or whether their serials and electronic resources team would remain unchanged. An ideal outcome would be an electronic resources team fully integrated with acquisitions teams, cataloging, and digital initiatives. They expect that there will be better and increased communication about electronic resources among all the stakeholders and that all team members will participate in communication, rather than just the team leader. They plan to use the core competencies as a basis for staff performance evaluations and assessing staff development needs, as well as for educating colleagues who are not familiar with serials and electronic resources.

About the Presenters

Clint Chamberlain has been an active member of NASIG since he was a student travel grant recipient in 2000. He has been the Coordinator for Information Resources at the University of Texas Arlington since 2010, where he oversees collection development, acquisitions, and preservation units.

Since earning his MS in Library Science from the University of North Texas, Derek Reese has been a librarian at UT Arlington. He started as a Metadata

Librarian in the cataloging department before moving to Information Resources, where currently his title is Continuing Resources and Information Content Librarian.

LibX: The Small but Mighty Button for E-resource Discovery and Access

Galadriel Chilton, University of Connecticut
Joelle Thomas, University of Connecticut

Reported by: Heather Barrett

Author Supplied Abstract: LibX is an open source browser extension (project site: http://www.libx.org/) that pushes access to a library's e-resources and services out to users wherever they are on the Internet (e.g. Amazon, Wikipedia, etc.). Once installed in Firefox or Chrome, LibX appears as a button in the upper-right corner of a user's browser window (http://screencast.com/t/BNuItuTGhWd) and its functionality includes: a search box for library resources, links to library services, dynamic links back to targeted library holdings information for citations and books found on freely web sites, and a "reload current page with EZ Proxy" option for easy off-campus authentication. In Fall 2012, University of Connecticut (UConn) Libraries unveiled their instance of LibX along with homegrown user guides and instructional materials as well as targeted marketing and promotion efforts such as ad campaigns, short promotional videos, flash drives, and a "How Has LibX Helped You" contest. For the contest, people were invited to submit a 100 word statement about how LibX helped them. The goal is to promote LibX, but also gain insight on how LibX is being used and what features users of LibX found most helpful. This presentation will describe the successes and challenges of UConn's LibX implementation and promotion, as well as an analysis LibX usage as self-reported by users.

Galadriel Chilton and Joelle Thomas spoke about LibX, a free add-on for Firefox and Chrome browsers which links information on external websites to the same information in a library's website, discovery systems, or

subscribed databases. Chilton and Thomas realized that library users rarely begin their online searches through the library's web resources, opting instead for external sites such as Google, Amazon, and Wikipedia. They wanted to find a way to break down the walls between the library website and external sites and make library data easily accessible where users search for information on the open web.

LibX acts similarly to a link resolver: whenever it finds a piece of bibliographic information such as a book title, article citation, ISBN or ISSN, at an external site and links back to library subscribed content. Chilton and Thomas noted that setting up their LibX instance was pretty quick and easy, although setting it up for EBSCO databases took longer. They ran into some problems with Google Chrome and Wikipedia due to changes made by those organizations, but they were resolved. The staff at LibX has been very responsive to email and there is also a listserv available. LibX is not available for Internet Explorer and that is not likely to change.

A potential drawback with LibX is that it might easily be missed. Users have to know it is there and know how to use it. Accordingly, Chilton and Thomas planned an extensive marketing campaign to promote LibX. They created posters, held a contest in which users would tell how LibX had helped them, offered promotional giveaways, and created a LibGuide for users. They installed LibX on all of their library computers and librarians included it in their bibliographic instruction classes, as well as encouraging users to install it on their own computers. They also held workshops and demonstrations for faculty and subject liaisons. They do not have exact statistics on how many patrons have installed LibX, but they have received positive feedback to their marketing efforts. Faculty have been especially positive and appreciative of the service. They have also reported an increase in traffic on their library website.

About the Presenters

Galadriel is the Electronic Resources Management Librarian at the University

of Connecticut where she continuously seeks ways to push access to paid e-resources into users' native online habitats. She has a Master of Library Science from Indiana University and a Master of Education in Instructional Design and Educational Technology from San Diego State University.

Joelle Thomas is the Undergraduate User Experience & Media Technologies Librarian at the University of Connecticut, where she works to improve users' interactions with library spaces and services, both virtual and physical. She has a Master of Library Science from Kent State University.

Losing Staff: The Seven Stages of Loss and Recovery

Elena Romaniuk, *University of Victoria Libraries*

Reported by: Marsha Seamans

Author Supplied Abstract: During the past 12 months, the University of Victoria Libraries said good bye (due to retirement) to both of our serials catalogers. Due to impending budget cuts, we were not able to advertise either one of these vacant positions. This session will address the approaches taken and the strategies implemented in coping with the loss of these two highly experienced and highly trained staff members. By applying the skills and abilities in the "Supervising and management" core competency, we are implementing changes that will, in the long term, allow us to continue to provide high quality service to users.

Applying the "Seven Stages of Grief" to the loss of staffing at the University of Victoria Libraries, Elena Romaniuk outlined the steps that were taken to cope with multiple budget cuts, loss of experienced staff, reorganization, and realignment of responsibilities. Approximately twenty librarians in technical services in the 1980s have been reduced to four, with similar reductions in support staff. In addition, the serials department recently faced two retirements.

The seven stages of grief are: 1) shock and denial; 2) pain and guilt; 3) anger and bargaining; 4) depression; 5) upward turn; 6) reconstruction; and, 7) acceptance and hope.

The "shock and denial" stage was characterized as "numbed disbelief, while "pain and grief" were reflected in the loss of friends and coworkers. The remaining staff found that they had lost resource people; they lost the knowledge, experience and institutional memory that those people carried. Additionally, their workload increased. In the "anger and bargaining" stage, the staff found that they could not really be angry at their coworkers for being able to retire. The department head considered requesting one position to be filled, but found that it was not an option.

The "depression" stage was refocused on reflection regarding how the work had changed over time, what was needed to do the work, and how the remaining staff could help. The work had become much more complex and diverse, partly due to large special collections gifts. There was less low-level work and more high-level work, and there were much fewer active serial print titles. In order to get the work done, staff at higher skill levels was needed, but hiring additional people was not an option. The existing serials staff held extensive experience and was familiar with records, processes and routines, and was very willing and able to be trained in new tasks. The result of this reflection was to reassign work to remaining staff, rewrite job descriptions, fill out job questionnaires, and implement an extensive training program.

The "upward turn" came from the approval to go forward with the plan. Job descriptions were rewritten and jobs were evaluated. One-on-one cataloguing training was begun, and group training meetings were booked in advance to cover concepts, policies and problem solving.

The "reconstruction" and "acceptance and hope" stages are ongoing. Training was started in April 2012 and staff is cataloging with ongoing record review. Priority and goal setting is also ongoing, with one decision being to postpone implementation of RDA. Staff in the department has both acceptance and hope, at least for now, and they are willing, capable, and cooperative with the changes and acknowledge that though backlogs may grow, their work will get done. They are waiting to hear how jobs will be reclassified. Romaniuk talked about what worked in their favor, what coping strategies were used, and some of the challenges they encountered, as well as future plans. They had time to ponder and evaluate options, prepare documentation, and do some training before experienced staff retired. They were also fortunate to have administrative support.

As a supervisor, coping strategies included being available to staff, providing ongoing problem-solving help, clarifying priorities, documenting procedures, and providing reassurance that it was okay to take time to learn and consult. Challenges included the need to provide more training, underestimating the time needed for problem-solving, multiple simultaneous demands, and always too much work. The merger of the law library's technical services into the department also introduced additional challenges.

For the future, Romaniuk continues to ponder the situation and to analyze where help is needed. She has written a proposal for an additional librarian position. Considerations include a possible reorganization and/or requesting help from another area, possibly from cataloging.

About the Presenter

Elena Romaniuk has worked as a Serials librarian since 1984, starting out as her career as a serials cataloger by taking on the responsibility for cataloging IEEE serial publications. Elena later took over the responsibility for the bibliographic unit responsible for cataloging serials in all formats and eventually became the Head of Serials Services at the University of Victoria Libraries.

Realizing the Value of Non-purchased Content

Elyse Profera, Taylor & Francis Group
Meg Walker, Taylor & Francis Group

Reported by: Linh Chang

Author Supplied Abstract: Taylor & Francis would like to present on the challenges librarians face in helping their users to understand and realize the value of the increasing quantity of content that is freely available to read, including open access journals, repositories, blogs and wikis. On helping users to navigate this content, librarians often have no 'ownership' in the traditional sense of library acquisition and often no usage statistics by which to gauge relevance. The basis of this presentation would be a white paper, currently in progress, that investigates the issues and challenges that libraries have in realizing the value of the content that they do not purchase. The hypothesis of the research is that users are increasingly overwhelmed with content and find it difficult to navigate effectively through what is available and then apply it in their research, studies or teaching. We want to start a debate on next generation publishing activities to start solving some problems by, for example, providing content in more navigable, flexible, digestible formats. As a publisher, we want to provide help and support for librarians in the challenges that they face navigating non-purchased content.

The presentation was based on an extensive research project that Taylor & Francis conducted over the past eight months regarding the exponential growth of free online resources and their value for teaching, learning and research purposes, as well as the many challenges they bring to both librarians and their user communities. The importance of these free resources and the issues relating to their discoverability prompted T&F to have the results of the study written up into a white paper entitled "Facilitating access to free online resources: challenges and opportunities for the library community." The audience was encouraged to review the paper at http://www.tandf.co.uk/libsite/pdf/TF-whitepaper-free-resources.pdf and provide feedback.

Profera began the session by explaining why T&F undertook this research: because they wanted to explore issues relating to discoverability of free content, to identify the challenges facing librarians in providing access to free online resources, and to help librarians in their quest for facilitating discovery. Next, the presenter provided an overview of the methodology T&F used to conduct their research. It included distributing questionnaires to several focus groups, Tele-depth interviews, and an online survey. She then gave a brief summary of the research objectives for the project, which included defining types of non-purchased content, understanding how librarians help users recognize quality and relevant non-purchased resources, identifying problems associated with using non-purchased content, and exploring next-generation publishing efforts.

The presenters provided an in-depth discussion on the primary findings of the research's seven key themes.

The Growth and Value of Free Content

The research findings in this category showed a rapid growth of free articles available via traditional open access. In 2000, there were about 19,500 articles published as open access, but by 2009, the number of open access articles had increased to 191,850. In addition, the number of repositories providing free access had grown to over 3,340. There are, of course, other types of free content ranging from podcasts and videos to presentations, blog entries and wikis. Given this dramatic increase, the question arises: how do librarians sift through all of this information to determine the quality and relevancy of the material to help their patrons? When the survey asked faculty to rate the importance of free content for their research and teaching, over 60% rated it as "very important," while 53% of the librarians surveyed also strongly agreed that free online resources add value to the research process. In addition 59% of librarians agreed that user-generated content such as discussion forums and social media sites will become more important for all subjects in scholarly communication.

Resource Challenges for Libraries

How much effort should librarians spend on selecting and managing free online content that the institution doesn't own? And how much cataloging time is devoted to facilitating discovery of free e-resources as opposed to paid resources? The survey revealed that whereas 84% of respondents said 10% or less of their time is devoted to cataloging free content, 83% of respondents agreed that investing more resources in providing better metadata for this type of content would benefit their institution.

Identification and Selection of Content

Lack of metadata generally makes the discovery of free online resources very difficult and unpredictable. Also, identifying access rights, whether access to content will be permanently free or free only for a limited time, and what the license terms for that content are, can be difficult and time-consuming. The presenters felt this explains why many librarians find, for example, T&F's Gold Open Access journals a useful type of free online content. In the survey, 67% respondents said they favored of this type of content because of its perpetual free online access.

The Role of the Library

The main challenge faced by librarians in selecting and evaluating appropriate resources and making them discoverable was primarily a lack of human resources. The survey revealed that while the majority of librarians feel they have primary responsibility in selecting and identifying relevant online content for their users, they also saw faculty as having some level of responsibility along with perhaps some other users. The presenters felt the idea of distributing some of this workload to faculty members seems like a practical way to bring in subject expertise to help librarians evaluate free online content. On the other hand, publishers are viewed as being less useful in this effort. The survey asked librarians how they make online content visible to users. 63% respondents said they provide links to free content from the library's website, 53% promote the use of Google or Google Scholar, 48% index free content in the library's catalog, 42% incorporate free content in federated/discovery search tools.

Information Literacy

The survey findings in this area show librarians are making efforts to collaborate with faculty members to provide training to increase user information literacy skills. Getting faculty to share their subject expertise in this endeavor with the user community along with the work of librarians is key not only in helping making content more discoverable, but in helping the user community learn how to distinguish which free online resources are most trustworthy.

User Needs and Expectations

Part of the challenge in this area is ensuring the library discovery service is robust and the interfaces are user-friendly in order to enhance the user's research experience. Many libraries have already made improvements to the user interfaces of their discovery services and ensure that they facilitate access to content beyond the library's subscribed collection. Librarians also need to use their abilities to find innovative ways to provide personalized services and eliminate what may be the all-too-common result of users choosing ease of access over quality. Furthermore, it is essential to make the library a fun place for users to visit where they will encounter success in finding what they need.

The Role of Publishers

The survey showed that librarians have split views on the role of publishers, and many feel they could do more to solve some of the problems around the issue of discoverability. With that said, many commercial content providers can and do help by providing better metadata and quality content. They collaborate with their user community to identify and help resolve the challenges we all face as free online resources continue to grow along with their importance to higher education, teaching and research.

The presentation concluded with recommendations for librarians, aggregators, technology partners, and publishers. For librarians, their recommendations were to invest more resources in relevant free content, promote the librarian as the facilitator of discovery, find ways to enhance discoverability through developing research methodology, better discovery systems, better evaluation and presentation of the materials, and personalization of the library services. This same set of recommendations also applies to the aggregators and technology providers with the addition of better indexing, faster and easier to use discovery systems, standardized bibliographic metadata, and trusted repositories of links and contents. For publishers, the priority is to make content permanent and discoverable, to adopt open access metadata standards, ensure permanent access and reliable archiving of these materials, ensure that publicly-funded research is freely available, improve integration on link resolver, and provide usage statistics for free content materials.

About the Presenters

Elyse joined Taylor & Francis Group as Associate Library Marketing Manager in July 2012. She is currently responsible for managing all library marketing activities for North and South America. Prior to this, Elyse worked for Synygy, Inc., the largest provider of sales performance management software and services, as its Marketing Manager, Vertical Markets, and Swets, a leading information services company, as its Marketing Communications Manager. Elyse received her MA in Public Relations from Rowan University, and BA from Saint Joseph's University. She has been published in *Serials Review* and *Information Today*.

Scholar Commons @ USF: Sharing Knowledge Worldwide

Carol Ann Borchert, University of South Florida
Julie Fielding, University of South Florida

Reported by: Paula Sullenger

Author Supplied Abstract: Librarians and faculty members now have the opportunity, through open access publishing, to work together to make faculty-produced scholarly content available to the entire academic community, not just to those scholars or institutions privileged enough to afford it. The University of South Florida Libraries have been working with bepress' Digital Commons platform to create a substantial institutional repository that includes open access journals, conference proceedings, and data sets, among other materials. Publication of open access journals at USF officially began in 2008 with the launch of Numeracy from the National Numeracy Network. Library staff members are currently involved in a variety of activities, including negotiating memorandum of understandings, loading back files, registering DOIs with CrossRef, designing layout, doing final publication steps, and assisting with technical issues. In 2011, our institutional repository, Scholar Commons @ USF, went live, allowing the library to pull fragmented collections previously hosted on other platforms into a single system with improved discoverability. This session will discuss some of these efforts, what is involved, how we have retrained existing and new staff, and plans for future directions.

We are seeing more and more libraries take on the role of scholarly publisher. Carol Ann Borchert & Julie Fielding talked about what goes on in the library to create a successful open access publishing venue. The Scholar Commons at USF is more than a digital repository; it hosts 12 open access journals.
The USF library administration has a commitment to open access and expanded existing relationships on campus to get its journal publishing program off the ground. They saw opportunities for small journals with a narrow focus that might not survive commercially.

They marketed the program's benefits to editors and authors as providing freely available online content with professional design.

USF created two new positions to work with Scholarly Commons on a part-time basis. Bepress trained these new hires in layout, DOI registration using XML files, and using the administrative side of Digital Commons. USF then embarked on an extensive campus outreach plan, including a university-wide press release, attending the Council of Deans meeting, departmental visits, building on existing faculty-librarian relationships, and hosting an Open Access Week event.

Borchert and Fielding described the intensive work required when a journal proposal is accepted. After a Memorandum of Understanding is signed, the long process of journal design begins, with the editors choosing logos, colors, banner, and the general look of their journal. When this is done and a demo site has been set up, the editors receive training from bepress and prepare for their journal launch. Borchert and Fielding have found that a general call for papers for an unknown journal doesn't work and launches are much more successful when the editors have a clear plan, such as starting with conference proceedings or with a special issue with a well-known guest editor. This process has led to twelve current open access journals hosted by the Scholar Commons with two more in the implementation phase and five open-access textbooks.

The USF librarians feel that their project is a success. One article from their *Journal of Strategic Security* has been downloaded more than 5,000 times. *Studia Universitatis Babes-Bolyai, Geologia*, previously a print subscription-based journal, has seen usage increase nearly 90% since it became an online open-access journal. *Numeracy* has had more than 39,000 downloads of its 95 articles.

This success is not without cost. The staff is operating at or beyond capacity and they are seeing increasing demand for their services. The repository is funded with soft money from the university foundation and does not have permanent funding. An audience member questioned the cost of being publishers vs. the cost of buying a subscription. The USF librarians feel that their efforts are part of giving the library a bigger footprint on campus and making them more necessary to the faculty.

About the Presenter

Carol Ann Borchert has been the Coordinator for Serials at the University of South Florida (USF) since 2004. Previously, she was in the Reference and Government Documents departments at USF, and in several areas of the James B. Duke Library at Furman University. She holds an MLS from the University of Kentucky and an M.A. in Spanish from USF.

Julie Fielding has been a Library Operations Coordinator at the University of South Florida (USF) since August 2011, working with electronic resources and open access journals. Before this, she was an Information Services Associate at Gale Cengage Learning. She holds an MLIS from Wayne State University in Detroit, Michigan.

Profiles

Joyce Tenney

Joyce Tenney's term as president began at the close of the Buffalo conference, but she has been serving NASIG for a lot longer than that. Joyce is one of only about five people who can truthfully say they have attended all twenty-eight conferences (and now she's promised to come to number twenty-nine in Fort Worth!). Joyce has followed the development of NASIG since she first learned that a group wanted to create the organization while she was attending a serials conference in Crystal City, Virginia, in the mid-1980s. She says that she was

thrilled to learn about NASIG, and has never looked back since that first NASIG Conference at Bryn Mawr in 1986.

Prior to her election as vice president/president-elect last year, Joyce spent a few years volunteering as the organization's conference coordinator, helping especially with site selection. Before that, she served as secretary (2006-2009) and member-at-large (2002-2006). Joyce Tenney and co-author Steve Savage drafted the first NASIG Committee Chairs Orientation Manual in May 2005, a manual that still guides committee chairs. Her committee service to NASIG has also included chairing the Bylaws Committee, co-chairing the Conference Planning Committee, serving on the Nominations & Elections Committee, and chairing the Regional Councils and Membership.

Joyce Tenney began working in the library part-time as a student assistant at the University of Maryland, Baltimore County. She enjoyed it greatly and ended up working there three years while completing her bachelor's degree in ancient studies. After graduation, she was hired as a staff member, and was pleased to work with a wonderful supervisor who encouraged her to get her library degree. (Her supervisor even handed her the application forms to fill out!) Joyce obtained her MLS at the University of Maryland's College of Information Studies in 1983. That same year, she was appointed serials librarian at the University of Maryland, Baltimore County. Joyce began supervising the Circulation and Library Media Departments on an acting basis in 2008, and permanently in September 2012, as a result of her appointment as associate director. Her duties include license negotiation, acquisition and management of continuing resources, and the management of access services.

Joyce has a hard time deciding which part of her job she enjoys most because she really loves it all. She especially loves working with faculty. In her current role Joyce has lots of opportunities to interact with faculty, and she finds them both fun and challenging. She did say, though, that she really enjoys licensing—something

she spends a lot of time doing –and acting as liaison to campus legal office.

How does she deal with the parts of her work that she likes the least? Joyce says she enjoys least the minutiae of system components for day-to-day operations. She is also not a huge techie, and deals with it by studying up on new tools before striking out and giving them a try. She says, "I don't believe in not trying. Even if I don't get it right, I will always give it a try." (Although that's probably why, she says with an audible grin, the tech department sighs when she calls them.)
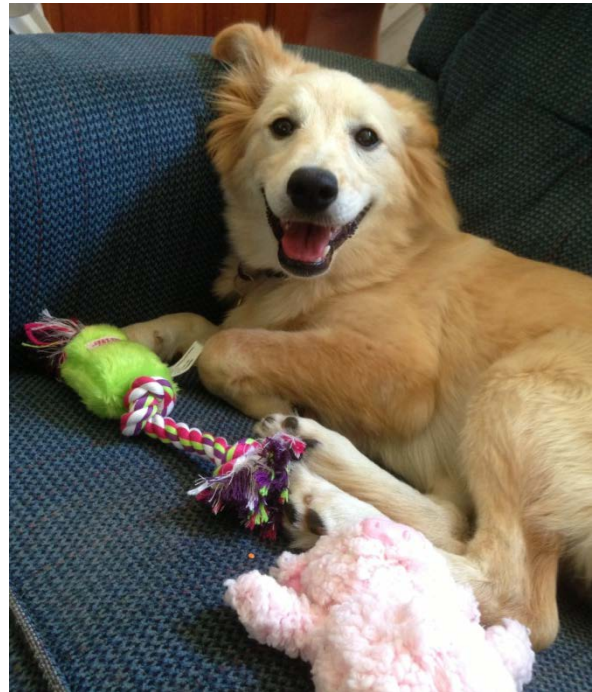
Newest Addition to the Tenney Family: 5-Month Old Gypsy

When asked what her favorite NASIG conference (or favorite moment at a conference) has been and why, Joyce only hesitated a moment. Overall, she says, the 2010 Palm Springs Conference was her favorite because "everything really clicked at that conference"—she was appreciative of the beautiful location, the good programming, and especially the 25th anniversary activities. All have been useful and beneficial to her, but that one has stood out.

NASIG has supported Joyce in her varying professional positions primarily by providing a network of colleagues. The conferences are important too, to

provide important information on happenings in the industry and on issues that will affect us all, but the most important thing to Joyce is the network of people she can connect with. "Are you doing this? How are you doing this?" she might ask, and she appreciates the exchange, including being the one who is called. Many facets of librarianship can be isolating because there aren't many people in any one institution doing a particular area. NASIG is important in abolishing that isolation.

Although NASIG is her first love, Joyce has also been involved at other conferences. She has led some pre-conference sessions for the Maryland Library Association Conference and hosted breakout sessions at a couple of North Carolina Serials Conferences. Most recently, Joyce presented at the Charleston Conference on establishing an e-book DDA program. She confided on her Charleston speaker profile that she will "occasionally try her hand at a Latin crossword puzzle."

She still keeps in touch with the Classics faculty on her campus. Her other hobbies include spending time with her "wonderful hubby" and her best furry pals. Joyce describes her husband Greg as a great NASIG supporter who just happens to be a retired director of public safety. (For more on Greg, see Maggie Rioux's profile of Joyce in the Newsletter 22:1 (2007).) Cookbooks are a favorite of Joyce's too, although she gives her husband

the credit of being a gourmet chef; she likes to point out recipes for him to try! They travel when possible, and spend as much time as they can with their dogs. Newest family member Gypsy is pictured below. Joyce is also involved in the Center for Celiac Research, co-chairing their annual fund-raising activity. She also serves on the board of the University of Maryland iSchool Alumni Chapter. "I'm an organizer," she says, and this principle spreads from her work into her volunteer life.

What changes does Joyce see for serialists over the next five years? How can NASIG help serialists be prepared for these changes? She believes that there's never a static time for serialists—what we do lends itself to so many changes, issues, and experimentation. The rapid rate of change will continue, enhanced because of the merging of technology with every facet of library work. NASIG can help people be prepared for these changes through networking opportunities and through spot-on conference programming. Joyce is also excited by the webinars that we have started—another educational tool to help serialists be better prepared for the future. She is grateful that folks are willing to share their knowledge.

So, is she still aiming for Baltimore to land a NASIG Conference? Joyce says that she would love to see us here someday. Be sure to tell her 'hello' in Ft. Worth!

Columns

Checking In
Kurt Blythe, Column Editor

[Note: Please report promotions, awards, new degrees, new positions, and other significant professional milestones. You may submit items about yourself or other members to Kurt Blythe at kcblythe@email.unc.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.]

Whereas serialists making moves either within their institutions or from one to another has been the path

less taken this summer, that leading to a life as a serialist is as busy as ever:

Benjamin Heet has just finished his first year as Electronic Resources Librarian at North Carolina State University. In his own words:

> I have spent the last three years deeply involved in the development of an open source ERMS, CORAL. That project has provided me the opportunity to work on the challenges of serials and electronic resources management with colleagues from around the world. The camaraderie gained from working on

common problems and shared solutions has been exceptionally rewarding. I joined NASIG this year because it is a community working together on these same issues and offers the opportunity to learn from colleagues' shared experiences.

Peter Koonz, Library Director for The College of Saint Rose, writes: The rather unorthodox path I took into serials librarianship began with my first position at The College of Saint Rose (Albany, NY) as systems and reference librarian in 1991. I transitioned into the director's office and have served as library director for 16 years. I have requested a move back to the library faculty, effective when a new director is hired, and I will be working in a newly configured position as Serials and Electronic Resources Librarian. I plan on being totally happy substituting the nature of the crises I will need to deal with – from dealing with broken toilets in the library to dealing with broken journal links!

Judith Koveleskie lets us know: I have been the Periodicals Librarian at Seton Hill for a number of years and was a member of NASIG when it was mostly concerned with print resources. As we moved to online resources, I was ordering, but someone else handled managing the online titles, so I let my membership lapse. Now I am handling everything and I was given an opportunity to attend the conference in Buffalo through a grant, so I decided to rejoin because I have a lot to learn. I always thought NASIG was one of the best organizations because the folks are very friendly and educational opportunities are right on target, no fluff. It's good to be back.

Laura Newton Miller writes: I've worked at Carleton University Library (Ottawa, Canada) since 2003. Until August 2012, I was a Science & Engineering Reference Librarian, and since 2009 was actively involved in scholarly communication activities. In September 2012, I became Collections Assessment Librarian, a new position in Technical Services (specifically in the Collections, E-Resources & Serials Department). This is a whole new world for me and I am eagerly soaking up everything I can. I am very interested in evidence-based library and information practice and I believe this goes

hand in hand with my work in assessment. I hope that my work will help the library make better-informed decisions about the collection. I'm very happy to have discovered NASIG and look forward to learning as much as I can about what goes on "behind the scenes".

Tessa Minchew notes:

I dabbled in serials when I began my technical services career as Documents Cataloging Specialist at the University of Southern Mississippi. My focus began to slant more heavily towards monographic and non-print cataloging following my move to Atlanta where I began work as a Catalog Librarian for Georgia Perimeter College. Over the years, my duties at GPC continued to evolve and I eventually became the Systems & Electronic Content Librarian for the college.

I returned to the serials fold in March 2013 as an Electronic Resources Librarian at North Carolina State University Libraries. In my new position, I will take a lead role in acquiring, licensing, describing, and providing access to electronic journals and databases. In addition, I will be managing projects, training staff, and developing workflows. I am very excited to begin this next stage of my career in the state-of-the-art James B. Hunt Jr. Library, working with an assembly of inspiring and talented people. I joined NASIG in June in an effort to further my understanding of serials work and broaden my professional contacts within the discipline; and I hope to be able to attend next year's conference in Fort Worth, Texas.

When not at Hunt, I can be found wandering around the State Farmers Market, eating scones and planning menus. Being an Atlanta expat, you will also frequently see me in downtown Raleigh, marveling over the wonders of free parking after 5:00 p.m.

Tessa L.H. Minchew
Electronic Resources Librarian
Acquisitions & Discovery
North Carolina State University Libraries
919.515.5182
tlminche@ncsu.edu

Lydia Pybum writes:

I have worked in libraries most of my life starting in fifth grade when I was a student helper in our school library. Over the years I have had a few jobs, but nothing felt as good as working in a library. I shifted to serials last year because I wanted to gain experience beyond circulation duties and to become a well-rounded librarian.

Currently I'm a Serials Acquisitions Assistant at the University of Texas at Arlington, but as my library is going through a reorganization, I'll be the Off-Campus Services Librarian starting in the fall. Though my work with serials will be scaled back, I plan on continuing to learn and volunteer with the department. I came to join NASIG as one of my colleagues would not be working with serials after the reorganization and would be vacating his seat on the planning committee for the next conference. I was hesitant to join, but my former department head said this is the only organization he has continued his membership over the years since he was a student. With those words, I was sold.

Welcome! One and all.

Citations: Required Reading by NASIG Members
Kurt Blythe, Column Editor

[Note: Please report citations for publications by the membership—to include scholarship, reviews, criticism, essays, and any other published works which would benefit the membership to read. You may submit citations on behalf of yourself or other members to Kurt Blythe at kcblythe@email.unc.edu. Contributions on behalf of fellow members will be cleared with the author(s) before they are printed. Include contact information with submissions.]

Summer's over, and with it, beach reading, but keeping up with the professional literature is never over. NEVER! As such, take a look below at what our colleagues have been producing of late:

Michael A. Arthur (Head of Acquisitions and Collection Services) and Natasha White (Senior Library Technical Assistant), University of Central Florida Libraries, co-authored:

"How Technology Fee Funding Transformed Collection Decisions at the University of Central Florida," April 2013 *Against the Grain*, v.25, no.2, page 32, 34.

For a respite from professional literature and a good read, be advised that Janet Malliett (Serials/Collection Development Librarian at Winston-Salem State University) has published a book with her daughter, Gabrielle, called *Beautiful Messenger*:

http://www.amazon.com/Beautiful-Messenger-Gabrielle-Jolie-Malliett/dp/1449008674/ref=sr_1_1?s=books&ie=UTF8&qid=1370286137&sr=1-1&keywords=beautiful+Messenger.

Then, Paoshan Yue (Director of Technical Services at University of Nevada, Reno, Mathewson-IGT Knowledge Center) published an article in *Technical Services Quarterly*, v. 30 no.3 (2013) pp. 253-265, titled:

"Transforming Technical Services: A Case Study at the University of Nevada, Reno Libraries," available at http://www.tandfonline.com/doi/full/10.1080/07317131.2013.785774

Abstract: Technical services in academic libraries face tremendous challenges to transform and move to the next generation of operations and services. Following an overview of the transformational changes affecting library technical services and the strategic shifts that are currently happening, in this article the author discusses the transformational efforts of Technical Services at the University of Nevada, Reno Libraries and concludes with lessons learned and suggestions for other libraries interested in exploring a transformation of their technical services.

Title Changes

Kurt Blythe, Column Editor

[Note: Please report promotions, awards, new degrees, new positions, and other significant professional milestones. You may submit items about yourself or other members to Kurt Blythe at kcblythe@email.unc.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.]

This past summer of 2013 has been a quiet one for serialists making moves, but quiet is not silence, and:

Anna Creech is now the Head of Resource Acquisitions at the University of Richmond.

Eugenia Beh will soon become – perhaps will have become by the time this column is published – the Electronic Resources Librarian at the MIT Libraries.

And, **Kathy Kobyljanec** has retired. As she writes:

> After six shoulder surgeries, most recently a reverse total shoulder replacement where the natural ball/socket configuration of the joint is reversed, I give up! I am retiring from my position as Head of Access Services and Interlibrary Loan, and Periodicals Librarian at John Carroll University this summer. We are building a vacation home in the mountains of Western North Carolina, and will do nothing with journals but read them in a rocking chair on the porch.

Congrats to one and all!

NASIG News

Call for Nominations

Kevin Furniss, N&E Chair and Danielle Williams, N&E Vice-Chair

The Nominations & Elections Committee invites nominations for Vice-President/President-Elect and three Member-At-Large Board positions. Information on each office is found at: http://www.nasig.org/site_page.cfm?pk_association_webpage_menu=708&pk_association_webpage=1188.

If you have someone in mind who would be great for a NASIG office, including yourself, please complete the electronic nomination form available at: http://www.nasig.org/site_survey.cfm?pk_association_survey=653.

You will need to login using your NASIG login and password. All nominations are anonymous even though you are logged in. You may submit multiple nominations for one office. If you have trouble with the online form, please send nominations to Kevin Furniss, N&E Chair, at kfurniss@tulane.edu.

All active NASIG members are eligible for nomination except current members of the Nominations & Elections Committee: http://www.nasig.org/site_page.cfm?pk_association_webpage_menu=1346&pk_association_webpage=3892.

The deadline for nominations is Monday, October 14, 2013.

Please contact the Nominations & Elections Committee chairs if you have any questions: Kevin Furniss kfurniss@tulane.edu or Danielle Williams daniellenasig@gmail.com.

Electronic Communications Committee News

The Electronic Communications Committee has been in high gear since the end of the conference. We have been very busy working on a project to migrate the NASIG website to a new platform. The new site will be much more flexible with regard to the kinds of changes we will be able to make in without the intervention of programmers. Vice co-chair for web management Chris Bulock is the liaison with our CMS provider for the

migration. Stay tuned for more information on this exciting project.

Because of the migration, ECC is trying to minimize the amount of work we do on the current website. Many thanks to former ECC co-chair Wendy Robertson for volunteering to update the committee rosters.

Another big change this year is that the NASIG publicist position, formerly a part of the Publications/Public Relations Committee, has been shifted to ECC. Publicist Char Simser proposed the idea to the Executive Board last spring, and the board agreed to a trial run. They will evaluate the trial at the January board meeting.

Under the guidance of Carol Ann Borchert and Smita Joshipura, co-chair and vice co-chair for all things email, all committee listservs and email addresses have been updated to reflect 2013/14 committee and board membership. Non-member conference attendees have been removed from NASIG-L.

Conference presentation materials received by the committee have been uploaded to NASIG's Slideshare site (http://www.slideshare.net/NASIG/) by Chris, Carol Ann, and co-chair for web management Kathryn Wesley. This year's presentations are tagged **nasig2013**.

New committee members Paoshan Yue, Julia Proctor, and Sandy Srivastava are being trained in regular ECC duties of Jobs Blog, NASIG Blog, social media, and spam filter maintenance.

Behind the Scenes with the Core Competencies Task Force

As you've probably heard by now, the NASIG Board has endorsed the Core Competencies for Electronic Resources Librarians as an official policy document. In this article we will take you "behind the scenes" to explain the process we used to arrive at this document, suggest some ways that you can use the competencies, and update you on our goals for this year.

The Road to the Core Competencies

The NASIG Core Competencies Task Force (CCTF) was created in 2011 with a charge from the NASIG Board to develop statements of core competencies for electronic resources librarians and serials librarians. Chairing the task force was a natural next step for Sarah Sutton, who had identified a set of core competencies as her dissertation project at Texas Woman's University (Sutton 2011), and presented the research at a popular NASIG conference session the previous year. In joining the new task force, we brought our own experiences teaching, publishing and working in the fields of serials and e-resources librarianship, in libraries with varying user populations, sizes, and geographic locations.

Work on the core competencies proceeded over the course of a year, beginning with an initial conference call to establish our goals and timeline. We agreed that we wanted to produce a document that would be flexible enough to accommodate e-resources work in any size of organization. We decided to use Sarah's methodology of conducting a content analysis on job descriptions. To ensure we were analyzing up to date positions that had actually been filled, we decided to ask e-resources librarians to send us their own position descriptions. During the next several months, we queried librarian listservs and received many job descriptions from around the country. We coded the documents in Google Docs, looking for patterns in the skills and experience, knowledge, and personal attributes called for. As we suspected, we found that the type of organization made a big difference in what e-resources librarians were expected to do, to know, and to be. We also received confirmation that many employers treated experience and knowledge as two separate things.

After some discussion, we organized our findings under seven categories: the "life cycle" of electronic resources, technological competence, research and assessment activities, communication, supervision, professional development, and frequently mentioned personal attributes. As we drafted a bullet-pointed narrative to share with the NASIG Board, Sarah kept in

contact with the Board and the CCTF liaisons, Katy Ginnani (2010-2011), Clint Chamberlain (2011-2012), and Selden Lamoreaux (2012-2013). A special session at the 2012 conference was set aside for the NASIG membership to review our findings (Borchert 2012). Insightful feedback from this session helped us clarify our objective in the final revisions to the competencies document. We were not seeking to prescribe the responsibilities of every e-resources librarian, but rather articulate the full range of skills, knowledge, and attributes from which each organization would select based on their structure, users, and resources. In the months after the 2012 conference, Sarah worked with us to complete revisions to the document, and she submitted the finished product to the NASIG Board for their endorsement this summer.

How Can You Use the Competencies?

Competency statements assist professionals in defining their own responsibilities, educating newcomers to their field, and communicating their value to outsiders. We see the Core Competencies for Electronic Resources Librarians as being relevant to a broad audience, including:

- LIS faculty, who can use it to develop and assess curriculum, prepare syllabi, and choose knowledgeable practitioners as course instructors.
- LIS students, who can use it to plan their course of study and build needed job and internship experience while in library school.
- Library leadership, who can use it to create job descriptions when hiring an e-resources librarian or evaluate existing librarians.
- E-resources librarians, who can use it to identify professional development opportunities, and to articulate their responsibilities as part of a self-evaluation for promotion or tenure. Competencies documents are good "conversation starters" that help colleagues in other areas of the library or elsewhere on campus (administrators, faculty in

liaison departments) understand what e-resources librarians do.
- LIS researchers, who can mine the competencies for problems that need to be solved and research gaps waiting to be addressed. Historians can read the competencies as a snapshot illustrating concerns in the field of e-resources librarianship at the beginning of the second decade of the 21st century.

What Is Next for Us?

The NASIG Board has asked the CCTF to complete the Core Competencies for Serials Librarians during the 2013-2014 year. We will provide progress updates throughout the year, and ideally have a draft ready for perusal by the 2014 Annual Conference.
View the Core Competencies for Electronic Resources Librarians at http://www.nasig.org/committee-core-competencies-task-force.cfm.

2013-2014 Core Competencies Task Force

Eugenia Beh, Texas A&M University
Steve Black, College of Saint Rose
Susan Davis, State University of New York, Buffalo
Sanjeet Mann (chair), University of Redlands
Cynthia Porter, A.T. Still University of Health Sciences
Taryn Resnick, Texas A&M University, Medical Sciences Library

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Borchert, Carol Ann (2012). "Brainstorming Session Notes." *NASIG Newsletter*, 27(3): 1-2. http://digitalcommons.usu.edu/nasig/vol27/iss3/21/
Sutton, Sarah (2011). *Identifying Core Competencies for Electronic Resources Librarians in the Twenty-First Century Library*. Librarian Publications, Mary and Jeff Bell Library. http://repositories.tdl.org/tamucc-ir/handle/1969.6/33

Serials & E-Resources News

Updated Transfer Code of Practice for Journal Transfer Released

Oxford, UK -- 17 July 2013 -- The UKSG Transfer Working Group announced it has released Version 3.0 of its Code of Practice for public comment (http://www.uksg.org/transfer/Code). Key updates in Version 3.0 deal with new content types, HTTP redirects, subscriber types, nomenclature, and communication. **Public review and comment are invited between now and 6 September 2013.**

The Transfer Code of Practice is a set of voluntary guidelines for publishers involved in any journal transfer. It covers thorny issues including ongoing access provision to online content, exchange of subscriber lists, DOI and URL transfer, as well as perpetual access rights to journal content.

Over the last year the Transfer Working Group has revised and improved upon the current version of the Code (Version 2, released in September 2008). The Transfer Working Group is inviting comments on the Code through the Transfer website (http://www.uksg.org/transfer), where the Code of Practice, a summary of changes from Version 2 to Version 3, a glossary of terms, and other information can also be found.

After the public review period, the Transfer Working Group will review the comments and decide if any revisions are needed to the Code in light of comments received. Once this is done, the Transfer Code of Practice v3.0 will be formally released, and publishers will be asked to agree to follow the new version. Publishers agreeing to align their procedures with the Code, and to apply them in practice when working with other, similarly aligned publishers, will be considered 'Transfer Compliant'.

The Transfer Code of Practice is a response to the expressed needs of the scholarly journal community for consistent guidelines to help publishers ensure that journal content remains easily accessible by librarians and readers when there is a transfer between parties, and to ensure that the transfer process occurs with minimum disruption.

If you would like more information about the Transfer Code of Practice, please contact our Co-Chair Transfer Working Group.

Alison Mitchell: a.mitchell@nature.com
Elizabeth Winter: elizabeth.winter@library.gatech.edu

Please see http://www.uksg.org/transfer/press

Report on the ACRL Scholarly Communications Roadshow Thursday, May 16, 2013 Illinois Wesleyan University, Bloomington, Illinois

Reported by Susie Bossenga, Serials & E-Resources Management Librarian, Northeastern Illinois University

Sponsored by Illinois Wesleyan University and Illinois State University in cooperation with the Consortium of Academic Research Libraries in Illinois (CARLI), the ACRL Scholarly Communications Roadshow was hosted at Illinois Wesleyan University. The one-day workshop was presented by Stephanie Davis-Kahl, the Scholarly Communications Librarian at Illinois Wesleyan University and Molly Keener, the Scholarly Communications Librarian from Wake Forest University.

The workshop began with a discussion of specific projects demonstrating emerging opportunities in scholarly communication. These projects show the power and potential of open scholarship. The Polymath Project, for example, uses a wiki to allow open contribution to the solution of complex mathematical problems to a broad spectrum of mathematicians.

The second session focused on access issues. It began with an overview of the scholarly communication

system and explored different issues that impact the system. The session concluded with a discussion of how these issues create problems and opportunities for libraries and other stakeholders. For example, institutional repositories can provide free access to taxpayer funded research, and therefore respond to the increasing pressure by state governments.

The third session addressed intellectual property issues by offering an overview of copyright and discussing how authors can manage and protect their copyrights. This was reinforced by a hands-on exercise examining copyright transfer agreements. One important point raised during this session was that many faculty members sign copyright agreements without reading them and are not aware that they can often successfully negotiate changes to those agreements. Librarians, however, can play a role in educating faculty regarding their rights and responsibilities as copyright holders.

Campus engagement was the subject of the final session of the workshop. During this session attendees learned why it is important to engage in conversations about scholarly communication. Both presenters and attendees shared ideas regarding how to engage different campus groups. Specifically, all participants discussed workshops and other formal events devoted to scholarly communication, but all concurred that individual relationships with faculty members and conversations about their research often provide the best opportunities to discuss scholarly communication issues.

Attending this workshop was a great introduction for librarians new to scholarly communication issues, but there were also plenty of opportunities for those with more experience to learn from their colleagues and share their own experiences. The presenters provided useful information and ideas and encouraged attendees to contribute to the conversation. In addition, the breaks and lunch offered opportunities to network with other librarians interested in scholarly communication issues. For more information about the ACRL Scholarly Communications Roadshow, go to http://www.ala.org/acrl/issues/scholcomm/roadshow.

Report on the Acquisitions Institute at Timberline Lodge
Sara Bahnmaier

The Acquisitions Institute is hosted at the Timberline Lodge, located on the side of Mt. Hood in the Cascades at 6,000 feet above sea-level. In May 2013, approximately 80 librarians, vendors, and publishers attended this event. Even though the Lodge is in a remote location about 1-1/2 hours outside Portland, the long trip from Michigan was well worth it. The mountain views are breathtaking; the Lodge is unique and full of interesting furnishings and decorations with spartan, yet modern guestrooms. The food, drink, and entertainment were outstanding.

The organizers are four librarians who worked on putting together this conference for years while the Institute has been held 13 of the last 14 years. Compelling proposals and speakers are actively sought out by the conference organizers, and the meetings strongly focus on collections. The keynote speech, "Beyond Measure: Evaluating Libraries", delivered by Chris Bourg (AUL for Collections at Stanford University) proposed new ways of evaluating collections and especially for their diversity. Bourg acknowledged the importance of valuing libraries for librarians, publishers, and vendors, who are all concerned about diminished collections, funding, and public or institutional support for libraries today. Bourg encouraged us to consider beyond the typical metrics and asked us to use idealism and core values such as diversity, preservation and social responsibility and encouraged us to explore nurturing them through our collections. Ultimately, the things that our communities truly value libraries for aren't always quantifiable. Are we prepared to diversify our purchasing and collaborate together to strengthen collections? Can we seek out new constituents and supporters and serve their needs?

For the rest of the conference, sessions featured practical results and concrete ideas, but infused them with idealism and noble purposes. We heard about how consortia develop their collection management

strategies as well as several other states and regions. Each entity had their own process of planning, implementing and evaluating, and they were all quite different from each other.

Librarians, publishers, and vendors discussed current issues in the acquisition of e-books, databases, serials, and even mobile applications. We learned new things about traditional topics that are familiar to those who work in library acquisitions including identifying and preserving unique print collections, relocating the print collection during remodeling, the influence of the Americans with Disabilities Act (ADA) on electronic resources, allocating budgets by formulas, assessing the impact of library collections on undergraduate education, and holding down the costs of purchasing and processing serials.

I felt inspired by the keynote speech, and I believe my fellow attendees did as well. Presenters and audience members often referred to ideas addressed by the keynote speaker. One of the attractions of a relatively small conference is that participants attend the same sessions, and as a result, there tends to be more discussion, including opportunities to informally exchange ideas. From what was said by veteran attendees, Timberline offers the opportunity for a free and open exchange of opinions and ideas—and snow!

Executive Board Minutes

June 2013 Board Meeting

Date: Wednesday June 5, 2013
Place: Hyatt Regency, Buffalo NY - Roosevelt Room.

Attendees

Executive Board:
Bob Boissy, President
Steve Shadle, Past-President
Joyce Tenney, Vice President/President-Elect
Shana McDanold, Secretary
Jennifer Arnold, Treasurer

Members-at-Large:
Chris Brady
Patrick Carr
Stephen Clark
Tim Hagan
Selden Lamoureux

Ex Officio:
Angela Dresselhaus

Guests:
Steve Kelley, incoming Vice President/President-Elect
Beverly Geckle, incoming Treasurer

Clint Chamberlain, incoming Member-at-Large
Sarah Sutton, incoming Member-at-Large
Peter Whiting, incoming Member-at-Large
Karen Davidson, Kelli Getz, PPC co-chairs
Susan Davis Bartl, CPC co-chair

Regrets:
Allyson Zellner (on leave)
Anne McKee, Conference Coordinator
Cindy Hepfer, CPC co-chair

Boissy let the Board know that recently posted on the Scholarly Kitchen blog is information about a new initiative called the Clearing House for Research in the United States (CHORUS), which is described as the publishers' response to the open access mandate for government funded research (http://scholarlykitchen.sspnet.org/2013/06/04/joining-a-chorus-publishers-offer-the-ostp-a-proactive-modern-and-cost-saving-public-access-solution/)

1.0 Welcome (Boissy)

Boissy called the meeting to order at 8:32am

2.0 Secretary's Report (McDanold)

2.1 Approval of October Minutes

VOTE: Motion to approve from Shadle, seconded by Clark. All voted in favor.

McDanold requested that all incoming Board members email their cell numbers and any special needs (allergies, etc.) to her for meeting planning purposes.

3.0 Treasurer's Report (Arnold)

3.1 Report

Arnold reviewed the submitted Treasurer's report, including a review of the current balance sheet. She noted that investments have increased, and is considering moving more into investments from savings. There are some changes to the accounts when funds reach the next level in the investment account. The current balance in the checking account is slightly lower than last year, likely due to additional up front conference costs this year, and Arnold expects that it will balance out after the conference is concluded. The average conference costs $150,000 to $200,000, and we need sufficient funds to cover without penalty.

The A/V company for the Conference did not accept our Tax Exempt status due to a New York state requirement to fill out an additional state-specific form. NASIG will receive a refund on the tax after the form is processed. The deposit has been made, and the form may or may not be processed by the time we have to pay the invoice balance after the Conference has concluded.

Arnold inquired about shifting funds from one account to another. One option she suggested was to consult Financial Development Committee. NASIG has an investment banker at Chase to provide guidance due to our tax exempt status. The Board determined that the FDC is focus is on fund raising, and it would be more appropriate to continue work with the banker instead.

VOTE: Boissy made a motion to have Treasurer consult with our Chase financial investment banker and review the account after the 2013 conference is settled in September and report back to the Board at the October meeting. Seconded by Shadle. All voted in favor.

Arnold reported that committee expenditures are low and noted that the Board saved money by having the January Board meeting in DC.

Arnold reported that the webinars were profitable and income is included in the balance sheet.

Arnold will update the conference sponsorships with new numbers after the end of the Conference to add in a few last minute sponsors. It was noted that for future Vendor Expos hotels must have space for at least 40 vendors to set up, and that we need to start the process of soliciting sponsors earlier. Shadle and Arnold both noted that there are a few parts of the form that need to be clarified, specifically related to invoicing and credit card payments.

ACTION ITEM: Tenney, Shadle, Boissy, Geckle, and Arnold will conduct a meeting to review and edit paperwork/form for Conference sponsorships. (Boissy/Arnold)

Finally, Arnold will be out on leave for a few months in the fall. The Treasurer-in-training, Beverly Geckle will fill in as much as possible, and Arnold and Geckle have begun planning.

4.0 Consent Agenda (All)

Awards & Recognition
Archivist/Photo Historian
Bylaws
Conference Proceedings Editor
Continuing Education
Database & *Directory*
Electronic Communications
Financial Development
Membership Development
Newsletter

Nominations & Elections
Publications & Public Relations
Site Selection
Student Outreach

Shadle brought to the Board's attention several issues from the Financial Development Committee. There has been a change in charge which has been posted to the website. The FDC is working on a promotional newsletter ad for conference sponsors and will get the sponsor contact list from Shadle after the Conference conclusion to coordinate ad submissions to the *Newsletter*. For this promotion, submissions can come directly from sponsors, and ads are for one issue only.

Lamoureux brought up a question from Awards & Recognition. The Mexican Scholarship winner was unable to get visa clearance to attend the conference. A&R would like to support attendance for this year's 2013 winner at the 2014 Conference in Fort Worth. The Board agreed with A&R's proposal. There was no Tuttle award winner this year, and the committee will be more aggressive seeking applicants next year. The award plaques have arrived and are ready to be distributed.

Boissy indicated that the current presenter options are causing some difficulty for *Conference Proceedings* and the author contracts need to be reviewed. The Board will ask *Conference Proceedings* to review existing options and make suggestions for clarification.

ACTION ITEM: *Conference Proceedings* needs to review author contracts from T&F and make recommendations; meet with T&F contact if needed. (Boissy)

Clark pointed out that the Continuing Education Committee needs to start planning on webinars for the year as soon as possible to address scheduling conflicts and begin advertising earlier. Chamberlain will remind the Committee when he takes over liaison duties.

Clark also brought up the NISO webinar pricing arrangement (NASIG members get member rate). If we were to do a joint webinar, how would that work in

terms of the financials, technical arrangements, etc. Clark suggested negotiating a lower rate for our members for the joint webinar if we are not receiving any of the proceeds. One topic suggested for the joint webinar is the implementation of PIE-J.

ACTION ITEM: McDanold will suggest to NISO Education Committee to do a co-sponsored webinar with NASIG in 2014 and will put them in contact with Chamberlain.

VOTE: Motion to consent agenda from Boissy. Seconded by Clark. All voted in favor.

5.0 Sponsorship Levels and Organizational Membership (Shadle)

Shadle reviewed the current set up for sponsorships. There are currently four tiers, with increasing benefits as the cost of sponsorship increases. There are also additional single sponsorship opportunities such as speaker expenses or Wi-Fi coverage for a day. Shadle has had several vendors express concerns regarding various parts of the current set up including the cost of table for smaller vendors, the mailing list price and tier list, and the difference between receiving an attendee list versus the member list (for promotion versus meeting setup).

5.1 Costs of Sponsorship Levels

Shadle suggested reducing the number of sponsor levels from four to three levels:

3: conference sponsorship w/recognition
2: acknowledgement plus table
1: additional advertising in addition to table

There will be an impact on registration rates as sponsors register at reduced rate and organizational members get three people they can register at member rate. This should be reviewed at the same time as other sponsorship benefits to determine relative worth to vendors and NASIG.

It was also suggested to review the Charleston Conference sponsor arrangements.

Shadle also suggested that $1,000 of the cost of an organizational membership could be used as a "credit" towards another conference sponsorship level, or $1,000 of the organizational membership could automatically slated for the conference budget.

VOTE: Shadle proposes to allocate $1000 of each organizational membership fee to the conference budget. Seconded by Lamoureux. All voted in favor.

5.2 Mailing List versus Attendee List/Contacts

A vendor list is on the conference sponsorship webpage, but organizations that are not listed as vendors may choose to send one representative over another depending on attendee list.

Currently top tier sponsors will still receive a snail mail mailing list (no email) for members.

The Conference attendee list (with name and affiliation) will be posted behind the firewall to fulfill attendee requests for the list. It will it be posted at the close of early bird registration. At the same point, the attendee list (name and affiliation only) will be sent to vendor sponsors (Tenney will communicate this to CPC).

For organizational members, how will access to membership or attendee lists work? If they don't sponsor at the appropriate level, they'll still have access to attendee list via membership. Essentially it becomes an unspoken benefit/perk of organizational members not received by other sponsors.

Organizational members are NOT listed on conference sponsorship web page, nor do they receive other conference sponsorship benefits. But benefits do include an exhibit table; however they receive no corresponding *Newsletter* advertising benefits.

ACTION ITEM: review levels of sponsorships at ER&L and Charleston; Arnold will provide historical

registration/funding information for consideration; revise NASIG levels to three tiers; review discounted registration rate benefit; bring proposal to Board by August (Shadle/Tenney/Boissy/Whiting)

5.3 Scheduling of the Vendor Expo

The feedback from attendees and vendors indicated that the six hour expo in Nashville was too long. For Buffalo it has been adjusted to just four hours before opening session. A remaining issue is arrival times of some attendees result in them missing the expo since it is before the conference officially begins.

Hotels usually have no secure and dedicated space for vendors so no option for ongoing exhibiting during conference breaks. This need may impact the hotel selection criteria if we need to provide additional vendor space during the conference.

Tenney suggested keeping the expo to four hours, and provide top tier vendors a dedicated room during the Friday breakfast for a demo or discussion with interested attendees.

Another suggestion is to incorporate lightning talks (approximately 7 min. long) into the Great Idea Showcase. Or we could open up the Great Ideas Showcase for vendors to buy space/table or to do a lightning talk demo.

As part of the benefits for the revised middle tier sponsorship level, vendors could receive lightning talk time and/or space for demos. Members would be able to give lightning talks for free through a first-come first served method. Lightning talks could be held on Friday and Saturday. The sponsorship coordinator (Past-President) and the CPC and PPC would need to coordinate times and scheduling to make this work.

These scheduling options will be considered in the action item listed under 5.2.

Finally, Shadle will do a short follow up survey with vendors this year and share with Board and the action

item group reviewing the sponsorship levels and benefits.

6.0 Trial of New PubPR Alignment (Boissy/Hagan)

Publishing component to CEC as a subgroup. Publicist to ECC.

Arnold and Bob Persing have been discussing the possible change with Tenney.

A recommendation was made that PubPR be dissolved as a separate committee. The publishing component of PubPR will move to Continuing Education as a subgroup of that committee. The Publicist will be moved to the Electronic Communications Committee to align the entire communications pieces under one umbrella.

The trial period will begin after the 2013 Conference.

ACTION ITEM: Solicit feedback from the members of PubPR, CEC, and ECC and review the trial in February before Kelley begins committee appointments.

Review of the realignment will be an agenda item for either the January Board meeting or the December conference call.

7.0 2014 and 2015 Conference Issues or Concerns

7.1 Ft. Worth, TX 2014

Tenney recommends conference cancellation insurance to address tornado season concerns.

VOTE: Clark moves to purchase conference cancellation insurance for Ft. Worth 2014 conference. Seconded by Brady. All voted in favor.

ACTION ITEM: Once all conference special events are decided, the Treasurer and CPC will communicate on insurance needs. (Arnold)

Tenney has asked CPC and PPC to begin theme and logo discussions immediately and will be moving all working

calendar deadlines up one month to accommodate the earlier date of the conference. It is recommended to open conference registration before ALA in January.

7.2 Site Selection 2015

McKee and Tenney are currently in negotiations with the hotel. NASIG will monitor renovation progress at the hotel.

8.0 Program Planning Report (Carr, Davidson, Getz)

Davidson reports they have had six program cancellations. Two of the cancellations were last minute, but we still have a full slate of programs.

Davidson also recommends future coordination with registrar to ensure program speakers are registered for the conference and adjusting the MOU to encourage registration by the end of early bird registration.

Some program cancellations are expected, but the number this year is unusually high.

ACTION ITEM: Review MOU for speakers/presenters to make language stronger to discourage cancellations (documented emergencies, NASIG is including their presence in budgeting, expect registration for conference by a specific date (discounted rate only valid through early bird registration deadline), etc.). This does not apply to invited vision speakers. Ensure a signed MOU for ALL presenters. Have a draft submitted to the Board by August 1, 2013. (Kelley, PPC)

Other than last minute cancellations, all seems to be running smoothly. The Committee worked well together. Anna Creech did a nice job on the schedule software. McDanold suggested a FAQ or instructions on the software for personalization.

RDA Pre-Conference made a last minute request for a microphone and flip-chart. The Board approved the request.

9.0 Conference Planning Report (Tenney, Davis, Hepfer)

Davis reports so far things are OK. The registration desk is set up and ready.

The Hyatt staff have been helpful, just mention you are with NASIG if there are any issues.

There is a map with restaurants and names of restaurants in the folder for attendees.
CPC will make any housekeeping announcements first, before introducing the speakers.

Buses are not intended to take everyone to the Transportation Museum on Saturday. Instead, attendees are encouraged to take transit buses/trolley to the ballpark stop and it's a short walk to the Museum from there. The food will be served at 7pm on Saturday, and a separate station for special dietary needs will be set up and clearly marked. Buses will be on Huron for loading.

For the ballgame, NASIG is in section 105. We do not have an uninterrupted block, but seats are close to each other so people can move if needed. Seats will be available for anyone that wants to purchase on site, but available seats may not be near the NASIG section.

Some road construction may cause a few delays to and from the airport.

The revised budget currently reflects a negative balance, but not all the numbers have been posted. Food cost was underestimated in the original proposal.

Attendees may have multiple invoices if they paid for additional costs (tickets, additional reception tickets, etc.). Each was seen as a separate transaction and generated a separate invoice.

10.0 Web Site Clean-Up Status (Hagan)

Hagan reported on the work that the ECC has completed work on the following:

- reorganizing conference archives (full text behind firewall but public citation page)
- clean-up is done for committee public and private space except Board private space
- new website and upgraded system approved and moving forward– put Board space clean-up on hold to see if easier after migration

The feedback on the ArcStone draft mock up #1 is that there was too much white space. It will be communicated to ArcStone for a second draft mock up. The migration will cost about $2400, which is only a little more than if we made the changes without migrating to the upgraded version. And with the new version, NASIG will have more edition options for the future.

The feedback from the ECC on moving the Publicist position to ECC: content for distribution is contributed from multiple sources and ECC posts content where appropriate. The Publicist was traditionally for outside communication, but this is no longer the norm. Having the Publicist under the ECC umbrella will be more efficient and will increase communication channels. One future option is to possibly expand the Publicist role to include some additional marketing for NASIG.

Char Simser wants to create a Publicist Manual to document social media options and other communication channels.

Boissy will meet with PubPR during the Committee meetings slot during the conference to discuss the trial. Once that is communicated, PubPR will split to attend the ECC and CEC committee meetings as appropriate.

Hagan encourages all the liaisons to consider this PubPR trial change to be an example of agility to make a change in a short period of time. This transition is a nice example of the agile development cycle.

11.0 Action Items Update (McDanold)

There are three documents of Action Items posted to the Board space for review:

- June 2012
- Oct2012/Jan2013
- May/June 2013

All "Action Items" will be considered either complete or assumed that they will not be completed. Any "In Process" or "Changed" items will be moved to a new document dated 2013June. All "Action Items" were reviewed and ongoing items were highlighted by Board members and edited/updated if needed. All new items from this meeting will be added to the same new 2013June document.

12.0 Taylor & Francis Author/Presenter Agreements Review (Boissy)

Blog post review.
http://blogs.library.duke.edu/scholcomm/2013/04/23/what-i-learned-getting-published-by-taylor-francis/

One option is to offer the choice to presenters to exclude materials from *Proceedings*? The Board concluded that this is not a viable option as the *Proceedings* are key to our professional organization.

Other questions discussed include whether NASIG should have exclusive rights or if NASIG should share rights to copyright with T&F. There was no compelling reason to give authors exclusive rights, and the T&F contracts are in line with library friendly policies.

It was suggested that Kevin Smith be consulted for ideas for revised contract for authors. He has expressed concern over the current contract for authors and has a great deal of experience in author rights issues.

The Board would like Program Planning to provide a briefing or summary of the concerns and the issues voiced with the agreements by authors regarding the contracts.

The current contract with T&F is available in the Board web space.

ACTION ITEM: Boissy will send author documents/contracts to McDanold. McDanold will post in Board space.

There is an earlier Action item under 4.0 for *Conference Proceedings* review of documentation. [**ACTION ITEM:** *Conference Proceedings* needs to review author contracts from T&F and make recommendations; meet with T&F contact if needed. (Boissy)]

ACTION ITEM: *Proceedings* needs to ask Program Planning for the issues voiced by presenters regarding the T&F agreements and use them to inform their review of the author agreements for the *Conference Proceedings*. (Lamoureux/Kelley)

13.0 Core Competencies (Lamoureux)

Lamoureux let the Board know that the next step is to finalize and publicize the core competencies. Suggestions include posting it on the NASIG website and adding it to the list of competencies on the ALA website.

Sutton reported that the document has been discussed by membership and input was incorporated into the documents, creating the final draft. The final draft document is ready to be approved by Board.

It was noted that the competencies will be a living document, and will need revisions to accommodate changes in technology and the serials environment.

ACTION ITEM: Task Force will make a recommendation for a revision cycle and make a recommendation which committee would be responsible for the Core Competencies document moving forward. (Sutton)

Latest version: April/May 2013

ACTION ITEM: Sutton/Lamoureux will send latest version of the Core Competencies document to

McDanold to post to Board space under the June 2013 documents. COMPLETE

ACTION ITEM: Board will review the latest version of the Core Competencies document and vote via Survey Monkey/Doodle. (All)

ACTION ITEM: After Board approves Core Competencies document, send to Publicist for distribution. (Lamoureux)

14.0 Financial Development Brainstorming Session (All)

Boissy brought the request for brainstorming options for the FDC to work on. Questions include: what financial activities are appropriate for NASIG? For what and from whom are we raising money? Is this for awards or organization expansion?

Carr pointed out that a membership drive to expand membership would bring in more money to support additional activities.

Shadle commented that the membership benefits for NASIGers are beyond just conference at this point. He asked what things do we want to do that we need more money to accomplish? He brought up the options of funding a part-time administrator to assist and support the Board, act as registrar, etc. which would reduce the demand on volunteers. Additionally an administrator position would help with consistency with Board member rotation.

Boissy suggested asking more of membership development, and give them money to support membership drives. But he also wants to balance support and benefits for existing members with the push for new membership.

Tenney suggested using funds to contract with a consultant for membership development and create a campaign for a membership drive.

Shadle pointed out that the pattern of membership is that members are newer to the profession.

McDanold noted that the conference program is focused on being more hands on for the practitioner, and there is less program support for people when they move to the administrator level. It becomes harder to justify continuing involvement as people move up in the ladder in their organizations into administrative roles and they have less hands-on job aspects.

Tenney noted that we have significantly more competition now from other organizations and conferences than we did even five years ago.

Arnold brought up that the FDC has an ongoing confusion about their role and a clearer charge is needed for what FDC should be looking at in the future.

Boissy suggested that FDC should brainstorm ideas and suggest use for any funds raised within the organization. But that the FDC would benefit from some hints about the needs of the organization from the Board. NASIG is a volunteer organization and depends on dedication and involvement of people serving on committees.

The Board suggested the following as possible things fund raising could contribute to:

- a part-time administrator to ease pressure and demand on volunteers and Board members and provide continuity from year to year as Committee and Board membership changes;
  - o Possible administrator duties could include exhibit management, membership processing, registrar duties, etc.
- maintaining the financial health of the organization (an increased cushion to give us some additional stability so we're not so dependent on the Conference success);
- fund Membership Development Committee campaigns and efforts to grow the membership

15.0 Webinars Review and Assessment (Clark)

Arnold reviewed the webinar revenue from the Treasurer's report.

Clark identified the last webinar as the least successful, likely due to conflict/competition with other webinars (NISO, ALCTS, etc.). Additionally, the title was awkward, creating a marketing issue since it was difficult to determine what the session was about from just the title.

ACTION ITEM: Chamberlain will follow up with CEC to see if the original May presenter (Lisa Kurt) is available to present in a future webinar on data visualization.

ACTION ITEM: Have CEC ask WebEx to see statistics of downloads of presentations to gage use beyond attendance during the webinars. (Chamberlain)

Clark reported that the CEC has other topics in the works possibly for September.

The Board agreed to continue to hold 4 webinars a year and suggested reviewing the NISO and ALCTS schedules to avoid future conflicts. NASIG needs to find a schedule for our webinars that doesn't compete and is more consistent and predictable so attendees and presenters can plan ahead better.

ACTION ITEM: Ask PPC to compile a list of the most well received presentations that could be reworked as a webinar and send list to CEC. (Kelley/Chamberlain)

Boissy suggested a webinar on effectiveness of discovery services at various institutions such as a presentation by Eugene Barsky from the University of British Columbia.

The Board reviewed the current cost structure for the webinars. Overall, the group registration at the $95 rate is consistently high and seen as a good value. The Board recommends keeping the registration rates the same at: $35/members; $50/non-members; $95/groups.

ACTION ITEM: CEC should review the NISO and ALCTS webinar schedules to avoid conflicts; and publish the schedule for the year in advance. (Chamberlain)

ACTION ITEM: MDC needs to ask the Registrar for list of webinar participants who are non-NASIG members for a targeted membership campaign. (Brady/Arnold)

ACTION ITEM: CEC should compile a few standard slides to add to every webinar for NASIG membership promotion and NASIG webinar promotion. (Chamberlain)

Chamberlain suggested a topic of continuing education for licensing, maybe as a series of webinars. Boissy suggested asking participants at registration to pose a question to be answered during the webinar by presenters.

It was suggested to consider offering a free webinar occasionally to boost interest and the earlier discussion of NISO/NASIG webinar joint presentation was highlighted. [**ACTION ITEM:** McDanold will suggest to NISO Education Committee to do a co-sponsored webinar with NASIG in 2014 and will put them in contact with Chamberlain.]

ACTION ITEM: Ongoing: have PPC send list of presentation proposals that were not accepted but would be possible webinar topics to CEC. (Kelley/Chamberlain)

16.0 Voting Process (All)
     Survey Monkey, Doodle, etc.

The Board needs to find a more consistent voting option for record keeping moving forward and to avoid the email influx of "yes" and "+#" for voting, which can be difficult to track accurately.

The Board agreed on the following plan:

- Scheduling and simple yes/no votes will be via Doodle.

- Voting on issues that may need discussion or more variations in options will be via Survey Monkey.

There was a request to try to use a consistent URL for the SurveyMonkey if possible and just edit the questions so Board members could bookmark the survey URL.

Email will be used for general discussion and brainstorming. The President or Secretary will determine when to end discussion, send out the deadline date to end discussion, and the Secretary will create the vote in SurveyMonkey or Doodle and send it to the Board list with the deadline to participate. Once voting is closed, the Secretary will close the poll and document the results.

The Board also agreed to continue to send messages to Board list when Board members will be offline or unavailable. In addition, the Board will try using a shared Google Calendar for Board members only to note events and absences.

ACTION ITEM: McDanold will set up a private Google Calendar for the 2013/2014 Executive Board and link to it from the Board work space.

17.0 Other Items (All)

17.1 Taylor & Francis Video Recording of Session

The Board agreed that this shouldn't be an issue, but that the members introducing the session need to alert attendees that Taylor & Francis is recording the session.

What about public sharing of the video? This should not an issue as long as it doesn't violate anything in the presenter/author contracts. The Board suggested that the PPC might want to consider adding a clause about session video recording for the future (such as: NASIG reserves the right to record and stream content).

ACTION ITEM: FDC will evaluate costs and investigate streaming options for portions (such as vision

sessions/all attendee sessions) of the 2014 Conference, both NASIG run and outsourcing options. (Whiting)

ACTION ITEM: Ask PPC to consider how to include language in their contract for all speakers to allow for live streaming. (Kelley)

17.2 Webinar Pricing/Timing

This item was discussed earlier under 15.0 Webinars review and assessment.

17.3 NASIG Table Staffing from 4:00-5:00pm

Stephen Clark, Joyce Tenney, and Steve Shadle offered to staff the NASIG table during the Vendor Expo from 4:00-5:00pm.

17.4 Cancellation (Involves a Program Cancellation) – Last Minute Request

The cancellation policy is spelled out in registration policy.

17.5 Next year's Board: October Meeting in Ft. Worth (Hilton) Scheduling Quickly

Tenney will let Board know as soon as she has possible dates for Ft. Worth. Tenney will also ask the hotel to consider September dates.

17.6 January Board Meeting: ALA Midwinter

ALA Midwinter 2014 is in Philadelphia from January 24-28, 2014. The Board meeting will be Thurs., January 23, 2014. Details will be forthcoming about location and hotel options.

17.7 Arnold – Outgoing Chair Gift Donation

An outgoing chair did not accept the gift offered, and instead chose to return the money the gift would have cost to NASIG. Arnold was asked about a receipt for their donation for tax purposes? This is not included in letter thanking them for their service.

ACTION ITEM: Arnold will ask the NASIG accountant whether or not the outgoing chair gift funds donated back to NASIG is tax deductible (not accepting the gift).

VOTE: Motion to adjourn meeting made by Shadle. Seconded by Clark. All voted in favor.

The meeting adjourned at 3:48pm.

Minutes submitted by:
Shana McDanold
Secretary, NASIG Executive Board

Treasurer's Report

Jennifer Arnold

NASIG finances continue to be healthy, and the investment account has made moderate gains over the past year. The slight difference in total equity between this year and last year at this time can be attributed to an increase in up-front payment for conference costs.

As of May 30, 2013
Equity total: $530,512.14
Investment account: $107,629.14
Checking account: $34,873.22
Savings account: $388,009.78

Committee expenditures are under budget estimates at this point.

Our revenue from the four webinars totals $6,760.09.

For the 2013 Conference, we had 26 sponsors providing a total of $34,000.

Thank you to all of our sponsors for their support! In addition, we added six organizational memberships for a total of $9,000.

Committee Reports/Updates

Evaluation & Assessment Committee Annual Report
Submitted by: Sally Glasser

Members

Sarah (Sally) Glasser, chair (Hofstra University)
Jennifer Leffler, vice-chair (University of Northern Colorado)
Bridget Euliano, member Duquesne University)
Maria Hatfield, member (WT Cox Information Services)
Carole McEwan, member (University of California, Irvine)
Peter Whiting, board liaison (University of Southern Indiana)

Continuing Activities

Review the Committee Manual, Committee Webpage, and NASIG Working Calendar for possible updating.

Completed Activities

In January, committee member Maria Hatfield accepted the position of Web Liaison.

In April, the committee began editing the Annual Conference survey with help from the Program Planning Committee. Changes were made to reflect the move from Poster Sessions to the Great Ideas Showcase. Additionally, the language for questions about technology needs was tweaked to reflect the increased popularity of tablets (in addition to laptops) and the importance of wireless access. As in the past, the survey was created in SurveyMonkey.

In June, the conference evaluation was finalized and a link to it was added to the NASIG conference webpage. Reminders were sent out before, during, and after the conference to encourage participation. As an incentive to participate, a $50 Amazon gift card was awarded by a random drawing. The winner was Regina Romano Reynolds, Director of the U.S. ISSN Center at the Library of Congress.

The Committee received eleven requests for individual conference evaluation results, all of which were sent out in July and August.

At the end of August, a final report of the conference evaluation results with a confidential link to the raw survey data was sent to the Executive Board as well as the Chairs of the Program Planning Committee and Conference Planning Committee. At the same time, the report (without the confidential link) was submitted for publication in the NASIG Newsletter.

Budget

None

Submitted on September 5, 2013

Mentoring Group Annual Report
Submitted by Danielle Williams

Members

Taryn Resnick, (out-going) chair (Texas A&M University Medical Sciences Library)
Danielle Williams, (in-coming chair) vice-chair (University of Evansville)
Gaele Gillespie, (University of Kansas)
Joyce Tenney, board liaison (University of Maryland-Baltimore)
Bob Boissy, (in-coming) board liaison

Continuing Activities

No continuing activities to report

Completed Activities

The mentoring program at the 2013 Conference was an overall success. The First-Timers/Mentoring Reception was well attended by mentors and mentees, as well as quite a few first-time attendees who had not registered as mentees before the conference. Thirty-nine attendees signed up to be mentees, thirty-four of whom signed up to be mentors prior to the conference. While most repeated calls for mentors went unanswered, several veteran NASIGers stepped up at the conference, and all but one mentee were paired up with a mentor, including those who had not signed up prior to the conference. As was done at the 2011 and 2012 conferences, the chair and co-chair were prepared to make matches during the reception. Despite the lack of an adequate meeting place, mentees and mentors were able to meet up easily, and any matching of mentors and mentees at the conference occurred with little fuss. Our thanks go to those experienced NASIG conference attendees, including Board members, who attended the reception and graciously stepped up as on-the-spot mentors, so that everyone who wanted a mentor received one. Additional thanks go out to the Membership Committee who graciously volunteered to assist with matching up mentors and mentees and were able to attend the reception and assist with set-up and coordinating mentors and mentees to the correct tables.

There were several issues with the location of the first-timers reception. A proper room was not provided which created a logistics problem compounded when mentors and mentees arrived at the same time. A table was provided for the chair and co-chair in an attempt to match mentees on the spot, but the position of the table at the entrance to the reception area created a holdup for attendees and much confusion amongst attendees. It is important that a proper location is found for the first-timers reception. Lack of organization and a suitable meeting room provided a poor first impression to first-time NASIG attendees.

Continuing a practice established with the 2011 conference, the Mentoring Group conducted a post-

conference survey of 2013 mentors and mentees about their experience. The survey was conducted via the NASIG SurveyMonkey account. All mentors and mentees were invited to respond, including those who were paired on-the-spot at the conference. We received a total of 47 responses, which is a 57% response rate. A summary of their responses is included below:

20 mentors and 27 mentees responded to the survey.
- 83% of mentors and 100% of mentees responding attended the reception.
- In answer to the question, "What did you enjoy most about the Mentoring / First Time Attendee reception?", mentors and mentees reported:
  o Meeting their mentors/mentees and other mentor/mentee pairs, networking
  o Free food
  o The relaxed/informal atmosphere at the event
  o Reconnecting with old friends, as well as meeting new people
- In answer to the question, "What can we do to improve the Mentoring / First-Time Attendees reception at next year's conference?", mentors and mentees reported:
  o More room
  o Tables to sit at/larger tables
  o Better signage for meeting with mentees
  o Bigger tables, more seating
  o Most agreed that pairings made before the conference were preferable.
- 78.3% (18) rated their overall experience as "good" or "great", 13% (3) rated it as "ok, neither great nor terrible", and 8.6% (2) rated it a "poor" or "terrible" experience.
- No follow up question was provided to inquire why the found the experience negative, but a follow up question should be added to the survey if this is an issue in the future
- 100% of mentors responding said that they were willing to participate as a mentor again

Based on our observations during the 2013 conference and the survey responses, the Mentoring Committee recommends the following for 2014 and future First-Timers receptions:
- Membership Development Committee members should continue to volunteer to assist during the first-timers reception.
- Provide a room with adequate seating to ensure ease of meeting and to avoid a logjam at the entrance.
- A designated small table should be provided at which the Mentoring Chair and/or Vice-Chair can handle on-site matching
- Continue the drawing. A certificate should be prepared in advance to present to the winner clearly stating the prize (i.e., they have won free registration for the following year's meeting).
- Continue to include a buffet, if possible. There were many favorable comments in the survey about the food.

The 2012-2013 Chair and Vice-Chair arranged a weekly telephone call in the two months before the conference to discuss planning, allocate work to be done and keep ourselves on track; this proved very effective

The outgoing chair and incoming chair met briefly during the conference to discuss the past years' activities and plans for the upcoming year. These included conducting and analyzing the Mentoring Post-Conference Survey and writing the Group's annual report.

Budget

The Mentoring Group does not require funding for its activities for 2011/12.

Submitted on: July 29, 2013

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