



# NASIG Newsletter

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## President's Corner

Steve Shadle, NASIG President

It's 4:30 on the Friday afternoon that this column is due. Those of you who know me know that if you want something from me, you must give me a deadline...otherwise your request will go into the ever growing inbox (which has grown mightily in the last year...no need for fertilizer here). As I write my last *Corner*, I wish to thank the membership for trusting me to hold the reins for a year and I especially wish to thank my colleagues on the Board and on various committees for their patience in working with me. I've always rebelled against list-making and at times the consequences of this choice are painfully obvious....as I regularly tell my grandsons: choices and consequences. Unfortunately, this column will not be as entertaining as Katy's column last year ("*We are all the eggman. We are all the walrus. Goo goo g'joob.*"), but like Katy, I would also like to express my appreciation to all the volunteers who make this organization work. At the UKSG meeting last month (more on that in a minute), several UKSG board members were *gobsmacked* (well, several of them didn't say that...only one actually used the word *gobsmacked*, but several expressed a similar sentiment) that we are a completely volunteer organization. It still amazes me that we're able to organize and run a national conference, develop and sponsor continuing education events, provide mentoring for newly minted librarians (and those not-yet-minted), provide a forum for those in the serials and scholarly publishing community and serve as a professional 'voice' for that community...and doing it all with a group of dedicated volunteers. I thank all of you who have renewed your memberships and have

volunteered in the past and will do so in the future. I would also like to acknowledge the contributions made by our commercial community (both at an organizational and individual level). We would not be able to do the work of the organization without your sponsorships and for that we are most appreciative.

### **By The Bonnie Bonnie Banks of Loch Lomond...**

Well, not exactly. More like 30 minutes away from the *bonnie, bonnie banks*. The annual UKSG meeting was held last month at the Scottish Exhibition & Conference Centre in Glasgow, Scotland (a building reminiscent of a gigantic metal armadillo). This was my second time attending this conference and I must say that UKSG is still doing something right...this year marked their most well-attended conference with over 800 attendees. Thoughtful plenaries, interesting workshops, and opportunities to network with my UK and European colleagues made for a personally and professionally satisfying experience. I highly recommend reviewing the conference blog <<http://uksglive.blogspot.co.uk/>> if you want to know the latest in what's going on with scholarly publishing and communication in the UK. On a personal note, now that I've seen an official *Parading of the Haggis* (Google it), my life is one step closer to completion!

### **One Month to Go...**

...before the conference in Nashville. In the December issue of the newsletter, I provided some details about the conference. Instead of paraphrasing what I've already written, let me provide you with:

#### Steve's Top 10 Reasons to Attend NASIG in Nashville

- #10 – No drunken Cubs fans
- #9 – Free parking and a free airport shuttle
- #8 – Meet with vendor colleagues and see the latest in products, services, publications and technologies at the Vendor Expo
- #7 – It costs the same as it did back in 2004, making it a bargain of a conference

#6 – “*Meat And Three*” (or for you vegetarians...“*Three*”)

#5 – To network with my community, to learn from my peers and to verify my job is really not that bad (and if it is...I can start networking with potential future employers!)

#4 – Elvis Presley's "Solid Gold" Cadillac

#3 – There IS such a thing as a free lunch!!

#2 -- Indecision 2012...too many good programs and only one of me (*Hmmm...I wonder if I can talk my co-worker into going to the ERM session so I can go to the Web-scale Discovery overview*)

...And the #1 reason to attend NASIG in Nashville:

To see your President completely embarrass himself at Open Mic night!

See y'all in Nashville!

## **Call for Volunteers**

Joyce Tenney, Vice-President/President-Elect

Please consider volunteering for a NASIG committee!

The link to the Volunteer Application can be found in the center of the page at [http://www.nasig.org/about\\_committees.cfm](http://www.nasig.org/about_committees.cfm). Below that is a list of all committees, descriptions of each committee can be found when you link to them.

Please remember that we are still 100% a volunteer organization. ALL of the work that we accomplish each year is carried out by members who volunteer to serve on committees and the volunteers you elect to serve as members of the executive board. One of the duties of the vice president/president-elect is to solicit committee volunteers, and then to assign volunteers to committees. So, it is my pleasure to send this call today. Please let me know if you have any questions or would like additional information ([tenney@umbc.edu](mailto:tenney@umbc.edu)).

If you've never served on a NASIG committee, or if you have but you took a break, please consider submitting a

volunteer application. It's a great way to meet other members and to learn more about NASIG!

Many thanks,  
Joyce Tenney

## Should NASIG Develop a Code of Ethics?

Patrick L. Carr

September 4, 2012

I begin this short editorial with a confession: NASIG colleagues, I've been living a double life. In addition to being a serialist, I'm also a student in East Carolina University's doctoral program in Technical and Professional Discourse. In one recently completed course, Ethics in Technical and Professional Communication, a topic of focus was the role that professional organizations play in establishing codes of ethics. The course emphasized that a code of professional ethics is crucial to guiding individuals within a profession about how to behave, how to evaluate their conduct and the conduct of colleagues, and, ultimately, how to conceptualize their profession. The course further taught that it is the responsibility of the organizations that lead professions to develop these codes. In doing so, an organization builds on its values and mission to establish the norms that will shape practices in the profession and help ensure that the individuals working within a field do so in a way that's ethical.

The juxtaposition of my course work with my work as a NASIG Member-at-Large has raised one obvious question in my mind: Should NASIG adopt a code of ethics? We are an organization that bills itself as the "preeminent organization for the North American serials community" and as holding "a leadership role in the global information environment."<sup>1</sup> In this capacity, I wonder if we should develop a code of ethics to guide our professional activities managing serials in the global information environment. The organizations of closely aligned professions like the American Library

Association and the Society of American Archivists do provide their memberships with codes of ethics.<sup>2</sup> Should NASIG follow suit by codifying a set of standards that serials professionals can refer to as a framework for guiding ethical conduct?

My intent here is not necessarily to argue that we should. Yes, it would be nice for NASIG to have a code of ethics, but I wonder—to use a phrase I first heard uttered by our colleague Rick Anderson—whether the juice is worth the squeeze. In other words, in the context of NASIG's competing goals and priorities, is it really a wise decision right now to devote the organization's scarce time and resources to the development of a code of ethics? It's not as if our profession is one that is grappling with an epidemic of aberrantly unethical conduct. So, a code of ethics might be a "nice to have," but what practical and immediate problems would a code of ethics solve for NASIG?

I can't offer a fully articulated answer to this question, but I do think that, at the very least, a discussion about what a NASIG code of ethics would consist of would be a highly productive exercise. Indeed, a consideration of the potential contents of a NASIG code of ethics readily leads to the consideration of more fundamental questions: what are the core values that unite NASIG's membership and how should these core values be reflected in our conduct as professionals? I think that contemplating these questions would help us to better define the NASIG community and, in doing so, better enable NASIG to play a leadership role in this community.

As we all know, the serials landscape is rapidly evolving. I think that addressing the fundamental questions associated with the development of a code of ethics has the potential to help enable NASIG to keep pace with these evolutions. But it would also be a lot of work. Again, I'm not necessarily advocating that NASIG take on this initiative, but, as our environment evolves and as our membership poses fundamental questions about NASIG's role and mission going forward, I believe that it is productive to consider the usefulness that the development of a code of ethics might have as a point

of entry into difficult questions that will have a major impact on NASIG's future.

Editor's note: Patrick will lead an informal discussion group on this topic at the 2013 NASIG conference.

- 1 "About NASIG" [http://www.nasig.org/about\\_history.cfm](http://www.nasig.org/about_history.cfm)
- 2 "Code of Ethics of the American Library Association" <http://www.ala.org/advocacy/proethics/codeofethics/codeethics>; "SAA Core Values Statement and Code of Ethics" <http://www2.archivists.org/statements/saa-core-values-statement-and-code-of-ethics>



## NASIG Communication

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Everyone is using social media to communicate and NASIG is no exception. NASIG now uses several different avenues to allow members to get NASIG news and interact with each other. The table below outlines the different communication and social media tools that

NASIG currently employs. More information is provided on the [NASIG website](#). And if you have any questions, please do not hesitate to contact the [Electronic Communications Committee](#).

Option	How it's used
Email blast	The NASIG Executive Board and committees can use this to send one-way email messages to NASIG members. There is no way to reply to these blasts.
NASIG-L	The electronic <b>discussion</b> list for NASIG members.
<a href="#">Website</a> Discussion Forums	Online discussion forums for NASIG members (must log into NASIG site to access). Contact ECC to set up a new discussion.
<a href="#">NASIG Blog</a>	The blog for NASIG membership. Anyone can read it, but only NASIG members can post to it.
<a href="#">NASIG Jobs Blog</a>	A separate blog focusing on job postings for serials and e-resources-related positions.
<a href="#">NASIG @ Flickr</a>	NASIG uses this site to store and share photos from the conferences and other activities.
<a href="#">Twitter</a>	NASIG uses Twitter to extend NASIG blog and newsletter announcements to the Twitterverse (or is it Twittersphere??). Anyone can tweet using the #NASIG hashtag.
<a href="#">Facebook</a>	Get on Facebook and follow announcements, start conversations, and post interesting news to NASIG Facebook followers (you need a Facebook account).
<a href="#">LinkedIn</a>	Another avenue to follow NASIG news and connect to members (you need a LinkedIn account).

## Post Conference Wrap-up

### 2012 Conference Evaluation Report

#### Submitted by 2012 Evaluation & Assessment Committee

Barbara McArthur (chair), Sally Glasser (co-chair), Bridget Euliano, June Garner, Jennifer Leffler, Maria Hatfield, Smita Joshipura, and Virginia Rumph

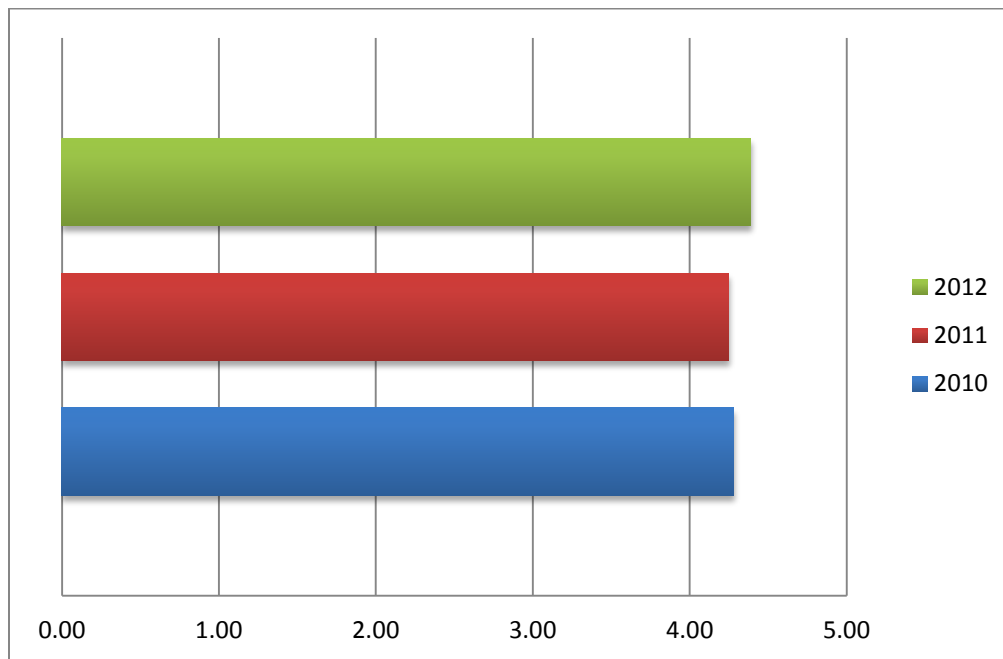
NASIG's 27th annual conference was held in Nashville, Tennessee. The conference featured four pre-conferences, three vision sessions, twenty seven program sessions, and six poster sessions. Other events included a first timers/mentoring reception, informal

discussion groups, a discussion on Core Competencies for Electronic Resources Librarians, a vendor expo, and a reception at the Country Music Hall of Fame.

This year, 239 of the 414 conference attendees completed all or part of the online evaluation form. This 58% response rate reflects a decrease of 20% from last year's rate of 78%. This was the sixth year that the evaluation form was available online. Those who completed the online evaluation form were also eligible to enter a drawing for a free conference registration. The winner will be announced in the NASIG Newsletter.

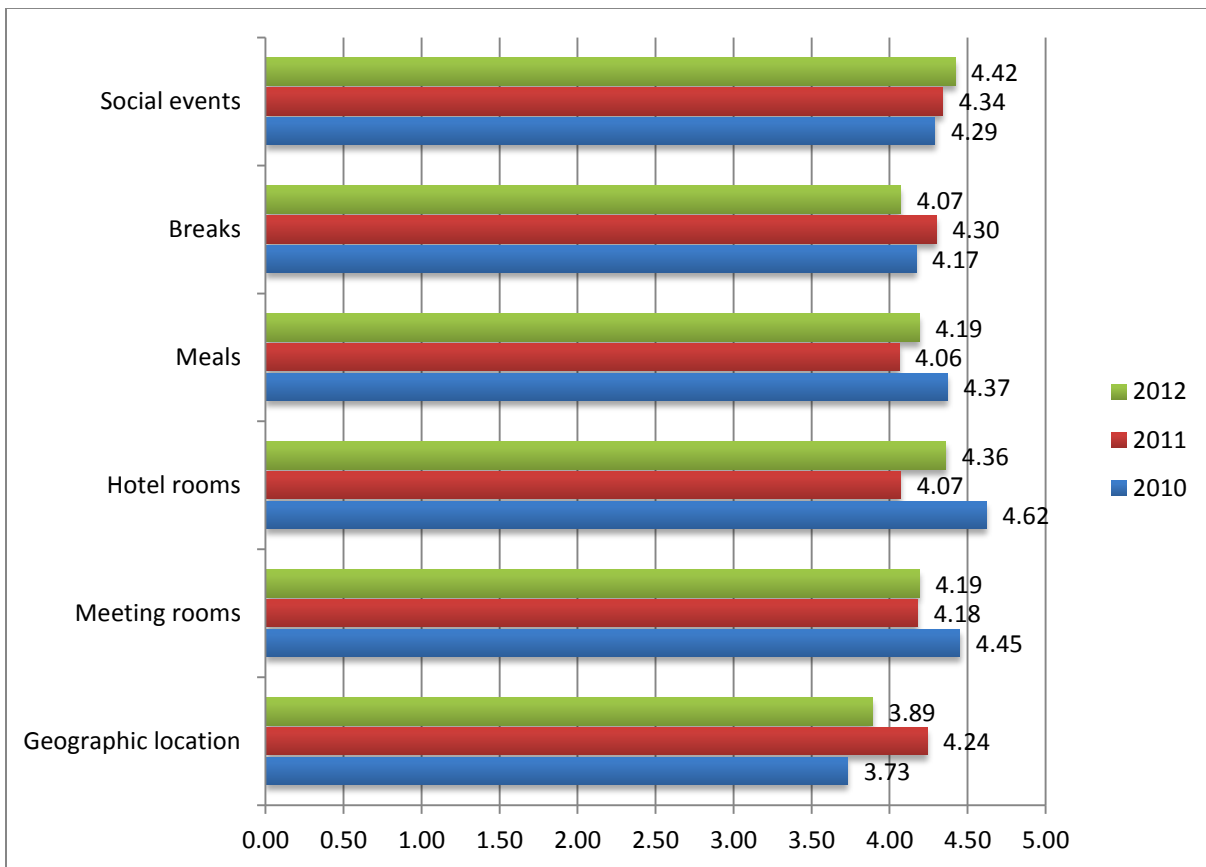
#### Conference Rating

#### 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 2012 conference was 4.39. This is slightly higher than 2011 & 2010 conferences which had ratings of 4.25 & 4.28 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.

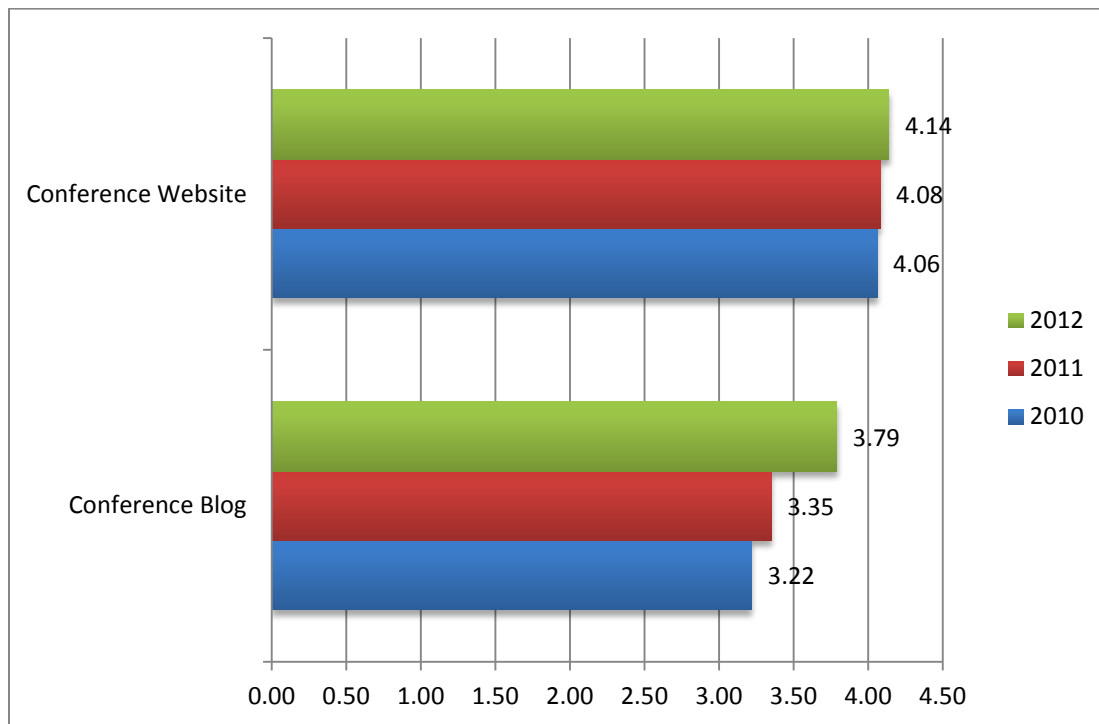
Geographic location had one of the biggest drops from 2011. Last year's conference in St. Louis was rated much higher at 4.24 than this year's 3.89 and even 2010's conference in Palm Springs with a rating of 3.73. The biggest rating jump was for the hotel rooms which were enjoyed more this year at 4.36 than in St. Louis at 4.07. Palm Springs still was the highest with a rating of 4.62. Some of the comments made concerning the location of the hotels were that neither was centrally located in town or within walking distance to an assortment of restaurants. Respondents generally liked the Sheraton Hotel, but weren't nearly as happy with the Holiday Inn except for their shuttle service.

The social events (4.42) and meeting rooms (4.19) received ratings similar to last year's, which rated 4.34 and 4.18, respectively. The rating for social events has

gone up each year for the past three conferences while the meeting rooms in 2010 were appreciated more (4.45) than in the last 2 years. The reception at the Country Music Hall of Fame was well received by those who commented, but many felt that location and transportation issues kept them from enjoying the Country Music Festival going on downtown. Many people commented on the temperature in the meeting rooms. It was generally felt that the rooms were too cold.

Breaks (4.07) were rated lower than last year (4.30), while the meals (4.19) were rated higher than 2011 (4.06). There were several comments concerning the meals and breaks. Most commented that the meals, especially at the Country Music Hall of Fame, were great. Others were not as happy about the box lunches or the selection at breaks.

## Online Conference Information:



Other conference information, including the conference web site (4.14) and blog (3.79) were both higher than in the past two years which had ratings of 4.08 and 3.35 in 2011 and 4.06 and 3.22 in 2010 respectively. This year, the forum was not an option so it has been removed from the chart above.

The majority of the responses indicated that people generally did not follow the blog. A couple of comments were made indicating some confusion about the charge for the Country Music Hall of Fame reception. They felt the website didn't clearly explain that the extra charge was for guests only. One person asked that more investigating go into improved mobile access.

NASIG again used the online store Café Press for conference souvenirs. Most respondents (81.6%) did not visit the store nor did they have an opinion about it. But 15.6% did like the selection of items. In line with last year's responses many people indicated they would prefer a wider variety of shirt colors, larger sizes and more variety of generic NASIG items such as buttons, travel mugs, etc.

## Program

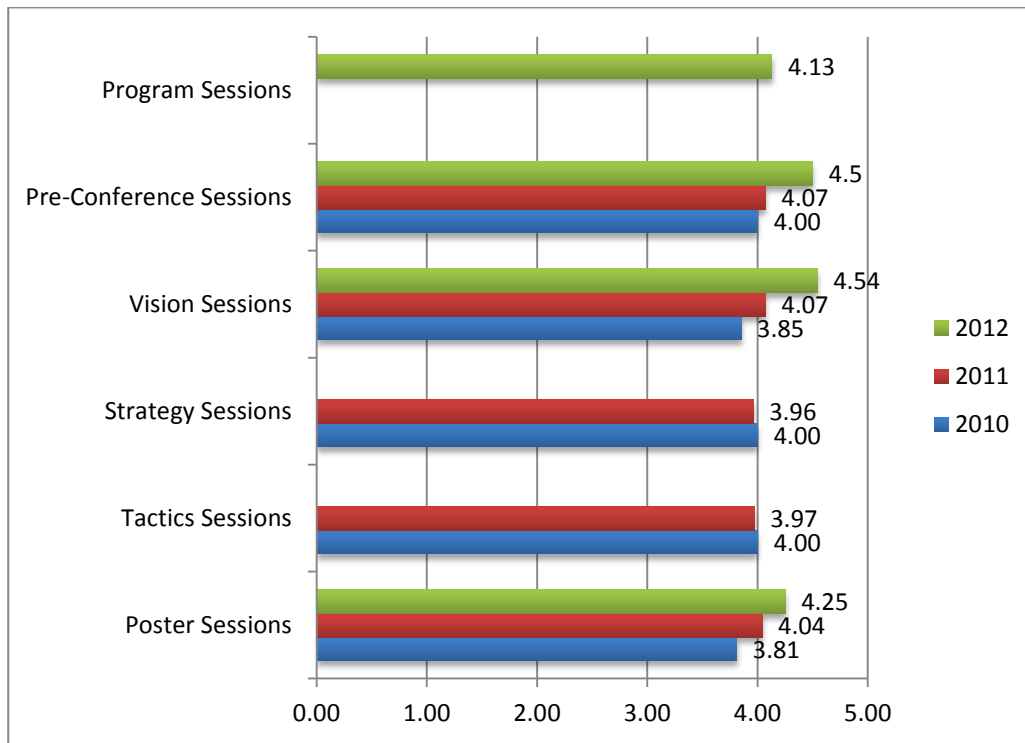
Respondents were asked about the balance in the types of programs offered. The overall rating was much higher this year than in the past couple of years. This year's rating was 4.21, whereas the last two years were 3.97 (2011) and 4.02 (2010). Many of the comments were generally positive about the variety of topics. Some people suggested that in the future there could be more presentations on RDA, higher level topics, and session geared towards public libraries or administration. Respondents were asked if the layout and explanation of program choices were easy to understand. The majority were positive, giving this year's program a rating of 4.38. This is an increase from the last couple of years, which were rated 4.12 (2011) and 4.16 (2010). Generally the comments were encouraging signifying that the program was easier to understand. Some expressed a wish for a streamlined program that could be used at a glance during the conference. Another suggestion was having the personal schedules displayed in date/time order on the registration invoice. A few felt that the 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 long enough, giving this a rating of 4.18. There were comments though that suggested adding another five minutes or so to allow for more networking and one-on-

one questions with presenters. Next respondents were asked about the length of the sessions.

Overwhelmingly responders felt the length of programs/sessions was appropriate, rating this at 4.46. Lastly, they were asked about the pace of the conference as a whole. Again overwhelmingly, the responders rated this positively at 4.47.

**Average Sessions Ratings:**



This year the conference featured three vision sessions. “Why the internet is more attractive than the library” by Lynn Silipigni Connaway (4.40), “Copyright and new technologies in the library: Conflict, risk and reward” by Kevin Smith (4.66), and “Is the Journal dead? Possible futures for serial scholarship” by Rick Anderson (4.56). The average rating for these sessions was 4.54, which is much higher than last year’s rating of 4.07 and 2010’s rating of 3.85.

they had no opinion. Many of the comments agreed that an hour was long enough for sessions and created less confusion in scheduling the sessions people wanted to attend. Ratings for the twenty-seven program sessions varied from 3.45 to 4.61 with the average being 4.13. This is a higher average rating than last year’s 3.97 or 2010’s 4.00. There were two sessions this year that tied for the highest score. They were: “Honing your negotiation skills” by Claire Dygert and “Practical applications of do-it-yourself citation analysis” by Steve Black.

This year the program was changed so there was no distinction between strategy or tactics sessions. This time there were only program sessions which were 60 minutes in length. Respondents were asked if they considered this an improvement over past years. 62.7% of people said yes, 5.5% said no and 31.8% indicated

Six poster sessions were presented this year with ratings from 4.08 to 4.38, averaging at 4.25. This is higher than the last two years’ average ratings of 4.04 and 3.81 respectively. The poster by Sanjeet Mann

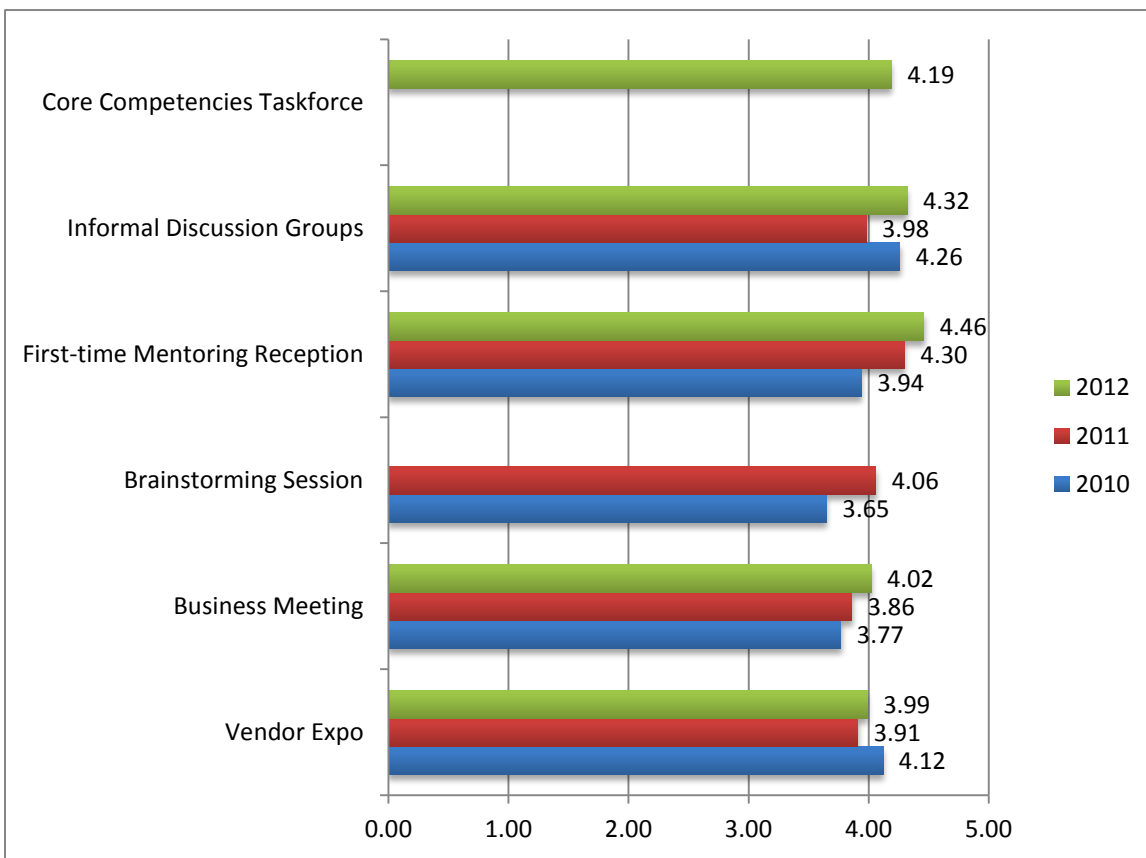


entitled “Correcting accidentals: Using an availability study to identify and resolve the “suspensions” impeding access to e-resources” received the highest rating.

There were four pre-conferences featured this year with ratings varying from 4.0 to 5.0, with an average of

4.50. This rating is higher than in the last two years with the 2011 average being 4.07 and the 2010 average being slightly lower at 4.00. The session called “Hands on with Drupal: Making a licensing database” by Amanda Yesilbas received a perfect 5.0 score.

**Other Conference Events:**



This year there were nine informal discussion groups which averaged a rating of 4.32. This was an increase from last year which had a rating of 3.98 and slightly higher than the 2010 rating of 4.26. The First-Timers/Mentoring Reception rated a 4.46, which is higher than the last couple of years with ratings of 4.30 and 3.94 respectively. As it was last year, 87% of respondents favored the continuation of this event in the future. The Business Meeting rated higher this year with a 4.02, whereas last year it received a rating of 3.86, and in 2010, a rating of 3.77. The Vendor Expo was slightly higher than 2011 with a rating of 3.99 compared to 3.91. Of the three years, 2010 was highest with a rating of 4.12. 88% of respondents agreed that the

Vendor Expo should continue in the future. However, there were multiple comments about the timing of the event as not all conference attendees arrived early enough to attend the Expo.

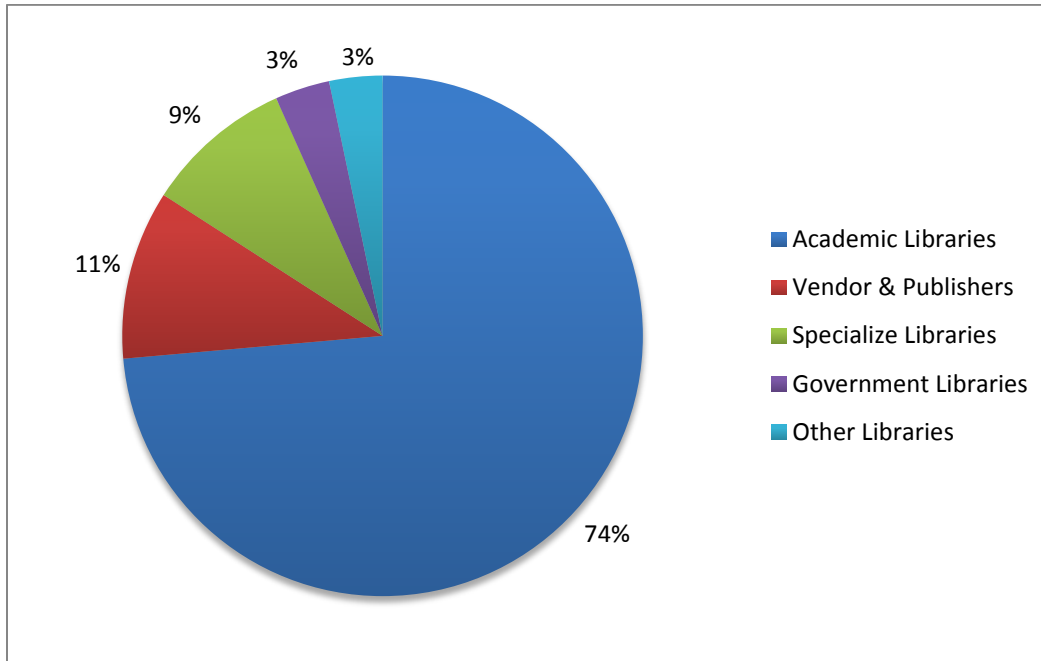
There was a new addition to the program this year, a report & discussion session called Taskforce on Core Competencies for Electronic Resources Librarians by the Core Competencies Taskforce. Respondents were asked to provide an overall rating for the session which was 4.19. Almost 76% of people stated they would like to see similar types of sessions in the future. Many comments stated the discussion was lively and provided very useful information. This year the committee

meetings were moved to a morning timeslot during breakfast with an option for a private meeting room. Respondents were asked if they preferred this new arrangement. 26% said yes, 5% said no and the majority said they had no opinion (69%). Some respondents commented that they liked the morning

timeslot, but not as early as 7:30am. Others stated the time fit better into the schedule as a whole. Some mentioned that there seemed to be some communication issues before the conference started about the new format.

## Respondent Demographics

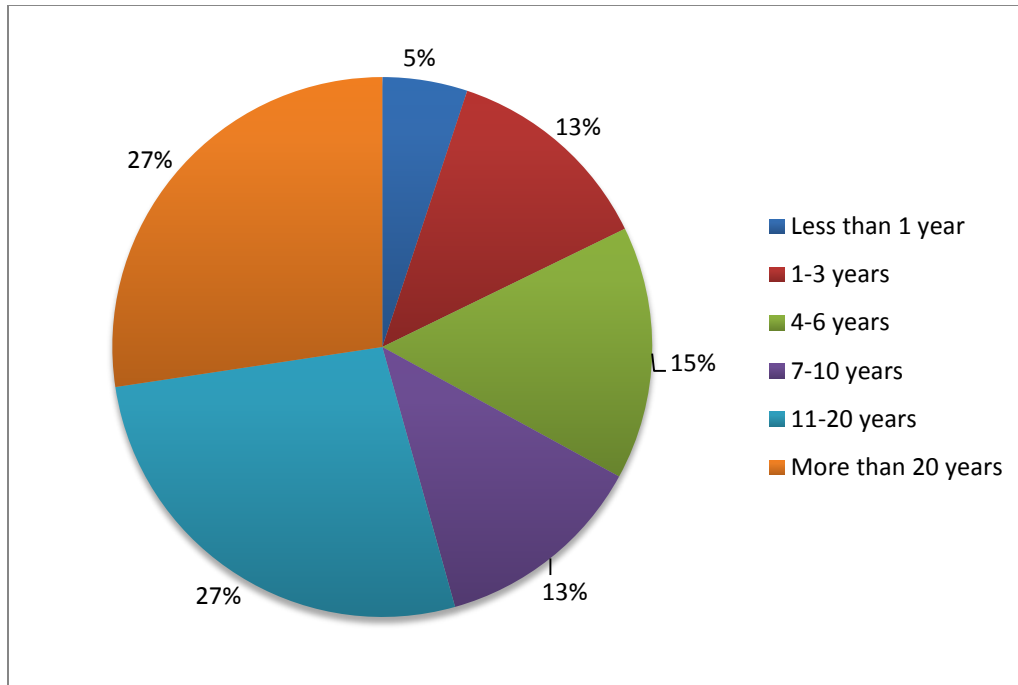
### Respondents by Organization Type:



Academic library employees continue to represent the largest group of respondents (74%). 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 11% of the total respondents. This was a lower number than in 2011 which was 13%, but higher than 2010's 8%. Attendees from specialized libraries including medical, law, and special or corporate libraries made up 9% of respondents, which is higher than last year's 6%, but not as high as 2010's 11.7%. Government, national and state libraries represented only 3% of the respondents. The remaining 3% of respondents included public libraries, students, library network, consortium, or utility, and those selecting

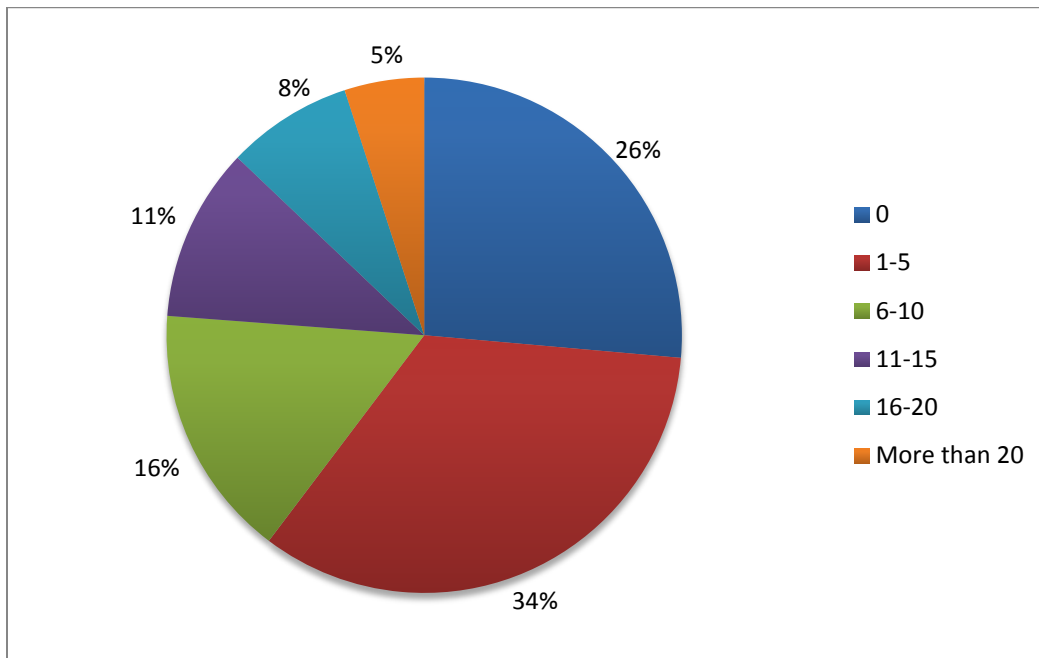
'other'. This was a lower percentage than in the last two years which averaged 5.4% and 6.1% respectively. Respondents were asked to describe their work, selecting more than one category as applicable. The largest respondent groups identified themselves as serials librarians (41.2%), followed by electronic resources librarians (38.7%), acquisitions librarians (30.3%), and catalog/metadata librarians (25.2%). Collection development librarians comprised 21.4% of respondents, licensing rights managers 16.4%, and technical service managers 15.5%. Reference librarians comprised 11.3% 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 are in the category of more than 20 years (27%) or 11-20 years (27%). Those with 10 or fewer years' experience comprised 46% of respondents, (see chart above for exact breakdown).

### Respondents by Number of NASIG Conferences Attended:



Most respondents were repeat NASIG attendees: 35.4% of respondents had attended 1-5 previous conferences, 23.8% had attended 6-10, 24.5% were first-timers, 7.1% had attended 11-15, 5.1% had attended 16-20, and 4.1% had attended more than 20 NASIG conferences.

## Brainstorming Session Notes

Sheraton Music City, Nashville, TN

June 8, 2012

### **Brainstorming Topic: Report from the Taskforce on Core Competencies for Electronic Resources Librarians (Presented by Sarah Sutton)**

Sanjeet Mann Introduced the Core Competencies Task Force: Eugenia Beh, Steve Black, Susan Davis, Cynthia Porter, Taryn Resnick, and Sarah Sutton

The Task Force thanks the Board Liaisons, Katy Ginanni and Clint Chamberlain, for their support.

The Task Force followed the method that Sutton had recently used in her dissertation research to determine the core competencies for e-resource librarians. Mann reviewed the section headings of the core competencies:

- Life cycle of electronic resources
- Technology/providing access to electronic resources
- Research skills
- Effective communication
- Supervising and management
- Trends and professional development
- Personal qualities

Comments from the audience followed:

- One member commented that they'd never be able to be an expert in all of these areas. This is a ceiling, not a floor—this document outlines something to aspire to. The Board is hoping to use ideas from this document for continuing education opportunities.
- Some jobs have only half of these responsibilities—technical versus public services; print versus online journals.
- ALA's statement of core competencies is very basic/general, not aspirational. They expect library schools to start from those core competencies, but expect that librarians will go well beyond that.
- Rename the competencies "Core Competencies for Electronic Resource Management" rather than for Electronic Resource Librarians. Some of the competency statements on the ALA website are

geared towards working with specific populations or in specific activities rather than specific librarians.

- One attendee suggested prioritizing these competencies from basic to advanced level.
- There was a concern about all of these skills being lumped into one position, when this is more than one person should be doing. Some positions focus heavier on certain areas, such as the person who does data analysis. This should be all skills across an organization, not those of a single person or position.
- One library hired two e-resources librarians at the same time, and there was plenty for both of them to do. In fact, they could use more such people. E-Resources is starting to be a more generic term covering a variety of responsibilities, including acquisitions, metadata, SFX, licensing, and troubleshooting.
- Areas such as communication and management are much more general than just e-resources. Even competencies that look like e-resources are things that can be generalized to other areas.
- Another library has 10 people working with e-resources and no "e-resources librarian" since all of them must have aspects of these skills.
- We might want to clarify in an introductory statement to the competencies that these might be skills across a team, not just for a single person.
- Another attendee suggested categorizing competencies in levels 1, 2, and 3, with 3 being advanced specialization. Work is mainstreamed or split among a number of people in management of e-resources. We are talking about competencies in working with a type of resource, not competencies for a specific position.
- UNC Chapel Hill had an Information Professional 2050 conference where they tried to predict what our jobs would be like in 2050. <http://sils.unc.edu/news/2012/ip-2050>
- We need to know bits of all of these aspects so that we know what we aren't doing or don't know how to do. At some point we need to know what we're giving up, what's in the big bucket of e-resource responsibilities that needs to be passed over or passed on to another person.
- There are distinctions between attitudes and knowledge. What do e-resources librarians need to know about, versus what do they need to do, versus what do they need to believe about the value underlying the work?

- Most of these skills are oriented to a technical whiz. Who is responsible for marketing the resources and making sure people are using them? This document is focused on acquisition and access.
- Marketing comes from a variety of sources in various libraries—public services, directors, e-resources people, marketing personnel.
- Whether e-resources librarians are marketing and promoting or not, we need to understand that is part of the process for e-resources.
- What about soft skills pertaining to negotiation?
- Perhaps the conversation about marketing should be in the context of library skills and needs, not in terms of e-resource librarian skills. We have enough to do.
- A lot of people do aspects of this job and don't see themselves as belonging here at NASIG. But they do belong here.

#### Notes by

Carol Ann Borchert, Secretary, NASIG Executive Board  
June 13, 2012, Rev. June 15, 2012

### Minutes from the 2012 Conference Business Meeting

Sheraton Music City, Nashville, TN

June 8, 2012

Shadle called the meeting to order at 3:19 p.m. Shadle introduced the current (2011/2012) NASIG Executive Board:

President: Steve Shadle

Vice President/President-Elect: Bob Boissy

Past President: Katy Ginanni

Secretary: Carol Ann Borchert

Treasurer: Lisa Blackwell

Treasurer-Elect: Jennifer Arnold

Members at Large: Patrick Carr, Clint Chamberlain, Stephen Clark, Buddy Pennington, Jenni Wilson, Allyson Zellner

#### Highlights from the Past Year (Presented by Steve Shadle)

- NASIG is financially sound, and Shadle wanted to especially thank Lisa Blackwell, the outgoing Treasurer, for her work. Our current account balances total \$542,000 versus \$503,000 this time last year.
- There has been an increase of 5% in personal memberships since this time last year, with 690 members this year compared to 660 last year.
- Organizational memberships have increased from 1 to 5 members. Our current organizational members are de Gruyter, EBSCO, Rockefeller University Press, Swets, and Taylor & Francis.
- This year, there were some changes in the structure of the conference. Tactics and strategy sessions have become just program sessions, rather than three separate types of sessions (tactics, strategy, and vision), with varying timeslots. This simplifies programming and speaker compensation. The Board would like to hear feedback regarding this change on the evaluations.
- This year, for the first time, NASIG has offered a reduced registration rate for one attendee from each vendor exhibitor.
- We have instituted use of Google Calendar to facilitate conference scheduling.
- NASIG continues to enjoy support from vendor exhibitors. Thank you to Katy Ginanni for her avid sponsorship work.
- Anne McKee has been appointed as the new conference coordinator.
- The *Conference Proceedings* contract with Taylor & Francis has been renewed for 3 more years, and it will include a 20% increase in the payment to NASIG, plus travel stipends for the editors traveling to the conference. We continue to have the \$25 personal subscription to *Serials Review*. Members will now be able to link directly to *Serials Librarian* from the NASIG site which will give us access back to the first conference proceedings.
- The Continuing Education Committee has been busy this year, and they have presented the first NASIG webinar. The webinar was a program by Jill Grogg, Beth Ashmore and Sara Morris regarding negotiation and the idea came from their successful program at the 2011 NASIG conference in St. Louis. There were 54 registrants for a total of \$3805 in registration income. The webinar software cost a bit over \$1500, so this favorably-evaluated webinar provided a tidy profit for us. We hope to make the

webinars quarterly. Some of the program ideas come from ideas submitted to PPC that were particularly successful programs or were not included in the conference program. We encourage people to submit webinar ideas.

- NASIG continues to sponsor outside events. This year, we sponsored five conferences: Great Lakes E-Summit (which was a first-time conference), Mid-South E-Resources Symposium, North Carolina Serials Conference, Ohio Valley Group of Technical Services Librarians, and E-Resources & Libraries. In most cases, we were able to negotiate a reduced registration rate for NASIG members.
- We have removed the discussion forums from the website, and NASIG-L is back. ECC continues to post items of interest to Facebook, LinkedIn, Twitter, and the NASIG blog.
- Shadle negotiated a reduced rate for *UKSG eNews*.
- We'll be discussing the work of the Core Competencies Task force later this afternoon. This can serve as a framework for other activities such as publications and continuing education. It could also potentially affect Publications, CEC, and Bylaws.

#### **Secretary's Report (Presented by Carol Ann Borchert)**

The Board has been discussing software needs for NASIG. The ArcStone features are not always the best choice for us for specific tasks. The Board voted to test RegOnline (<http://www.regonline.com>) for a webinar, to see if we want to use this software in place of ArcStone's registration software for the 2013 conference.

This brings up the issue that we need to review all of our system needs and what system(s) will serve us best. Board Liaisons will be asking committees what functions each group needs in the various activities that we do (conference planning, program planning, member registration, proceedings publication, elections, listserv management, archiving, etc.).

Falling along these same lines, PPC suggested creating wikis for the conference manuals rather than static .pdf files. A wiki model would be easier to update as committees went along, and it might facilitate sharing information among committees, such as CPC, PPC, PPR and the Past President. The ECC wiki from pbwiki is

publicly available, so we need to be careful about what information is stored in a wiki. In particular, the CPC manual should not be available publicly.

#### **Treasurer's Report (Presented by Lisa Blackwell)**

- NASIG is holding even on investment funds and hoping to grow as the economy grows.
- Account balances total \$542,000 versus \$503,000 at this point last year.
- Ginanni raised \$39,250 in sponsorships, plus an additional \$6,000 in organizational memberships. Ginanni was out until the last minute bringing in money.
- Committee budgets are on track, and details are available on the website
- Blackwell encouraged people to apply for Treasurer, and thanked everyone for their support over the past year.

#### **Introduction to the 2012-2013 Board (Presented by Pam Cipkowski and Christine Radcliff, Nominations & Elections Committee Co-Chairs)**

The 2012/2013 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

#### **Recognition of Outgoing Board Members and Committee Chairs (Presented by Jessica Ireland and Sandy Folsom, Awards & Recognition Committee Co-Chairs)**

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

- Conference Planning: Ann Ercelawn and Beverly Geckle
- Registrar: Kevin Furniss
- Continuing Education: Apryl Price
- Conference Coordinator: Joyce Tenney
- Database & *Directory*: Maria Collins

- Evaluation & Assessment: Barbara McArthur
- Electronic Communications: Tim Hagan and Wendy Robertson
- Membership Development: Sarah Tusa
- Nominations & Elections: Pam Cipkowski
- *Proceedings* Editor: William Joseph Thomas
- Program Planning: Michael Hanson
- Web Liaison: Abigail Bordeaux

Ireland also recognized the following Board members and thanked them for their service:

- Member-at-Large: Clint Chamberlain
- Member-at-Large: Buddy Pennington
- Member-at-Large: Jenni Wilson
- Treasurer: Lisa Blackwell
- Secretary: Carol Ann Borchert

- Past President: Katy Ginanni

### Discussion of Old Business (Presented by Steve Shadle)

There was no old business.

### Call for New Business (Presented by Steve Shadle)

There was no new business

The meeting adjourned at 3:46 p.m.

### Minutes Submitted by

Carol Ann Borchert, Secretary, NASIG Executive Board  
June 13, 2012; Revised June 14, 2012

## NASIG 2012 Conference Reports

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### Pre-Conferences

#### RDA and Serials: Theoretical and Practical Applications

*Judith Kuhagen, JSC Secretary;  
Library of Congress (retired)*

Reported by Valerie Bross

Back for a second year, but completely re-developed, "RDA and Serials" returned to NASIG as a well-paced, thorough, and engaging training opportunity for those wishing for a way to catapult into the new code for Resource Description and Access (RDA).

The structure of the preconference was logical and easy to follow:

- A review of how we got to this point in development of a new cataloging code;
- A summary of the goals of FRBR (Functional Requirements for Bibliographic Records), FRAD (Functional Requirements for Authority Data), and FRSAR (Functional Requirements for Subject Authority Resources);
- An introduction to the structure of RDA and how it relates to the FRBR entities, Work – Expression – Manifestation—Item (or WEMI);
- An in-depth review of elements and relationships under RDA needed by serialists in describing a serial; relating the serial to persons, families, and corporate bodies; and relating the serial to other resources;
- A discussion of the LC/PCC CONSER implementation of RDA (LC/PCC being the short form for Library of Congress/Program for Cooperative Cataloging);
- Hot-off-the-press news about recent developments in RDA and its implementation.

Each of the conceptual segments was accompanied by interactive exercises that helped build the participants' skill-set, and culminated in our creating full WEMI-based structure for five serials. To our amazement, by the end of this two-day workshop, we could actually do it. Such is the power of a master trainer.

So what's new?—you ask. Well, here are a few links to explore.

**Joint Steering Committee Proposals:** <http://www.rda-jsc.org/2012possibleproposals.html>

- Unique authorized access points: RDA does not require unique authorized access points (AACR2 uniform title) for resources published simultaneously in print and online. This affects series authority records. A proposal has been submitted for manifestation-level unique authorized access points.
- New work v. new manifestation: When a serial changes to an integrating resource, RDA requires a new manifestation description. Should this change be at the work level?
- New expression v. new manifestation: When two serials are simultaneously published at different frequencies (e.g., monthly and annually) they are

considered the same expression of a work. A proposal is in the works to make “frequency” an expression-level element.

**Training:** Library of Congress recently posted a suite of authority data training tools for those creating name authority records:

[http://www.loc.gov/catworkshop/courses/rda\\_naco/course%20table.html](http://www.loc.gov/catworkshop/courses/rda_naco/course%20table.html) (for background, please see: [http://www.loc.gov/catworkshop/courses/rda\\_naco/index.html](http://www.loc.gov/catworkshop/courses/rda_naco/index.html))

**Envisioning RDA:** Those struggling to develop an understanding of RDA will be pleased to learn of a tool created by MARC of Quality and available with a Creative Commons license. RIMMF, short for RDA in Many Metadata Formats, is a program that allows catalogers to build RDA records for Work, Expression, Manifestation, and Item independent of MARC21 coding. It's available at:

<http://www.marcofquality.com/rimmf> .

## Making the Leap to Mid-Management

*Kay Johnson, Radford University  
Molly Royse, University of Tennessee  
Micheline Westfall, University of Tennessee*

Reported by Jane Skoric

Once upon a time, there was a group of preconference attendees who dreamed of making the leap to mid-management. Well, not quite. The majority those present had found themselves bounding upward due to “shifts,” “changes,” and “restructuring” within their organizations. Nevertheless, all were eager to learn from the presenters, to share their questions and perspectives, as well as to build upon burgeoning hopes of living happily ever after.

The workshop was conducted by three academic librarians with “40 years of combined experience in middle management” and covered a wide spectrum of topics. After introductions were made, the tone of the workshop was set with an encouraging quote from the Dr. Seuss book, *Oh, the Places You'll Go!*: “You have



brains in your head. You have feet in your shoes. You can steer yourself any direction you choose.” Indeed! Our paths may not have been completely of our own choosing, yet the journey was ours in the making.

Onward to highlight a few of the many gems gleaned from this session.

### **Characteristics & Expectations of a Manager**

The move into middle management results in many changes. With the new role comes the realization that you are “no longer *one of the gang*, your words and comments carry a different weight to others, you are now part of a different team.” Additionally, it is important to “understand your department’s role in the library, the library’s role in the institution, etc.” Six roles/expectations of a middle manager were also described: Planner, Implementer, Assessor, Leader, Mediator and Counselor, and Change Agent.

### **Manager vs. Leader**

A brief exercise revealed that the skills required of managers and leaders are often the same or quite similar. One of the insightful quotes that was shared, “Leadership is setting a direction; Management is executing the plan.”

### **Human Resources**

Understanding that our most valuable resources are human, the presenter described the importance of learning how to navigate and work within the constructs of our institutions and the regulations set forth by our state and the federal government. The topic of hiring encompassed the position justification and description, advertisement, search committee and interview, selection and negotiation. It was noted, that sometimes the “best” person (when matched to a position announcement) is not necessarily the “right” person.

### **Budgeting, Relationship Building**

Similar to human resources, budgeting structures and processes are institution and state-specific. Some sage advice shared: find out where there is flexibility within the budget, develop contacts and reciprocal understandings (examples: tour the accounts payable office, educate purchasing people about your operation), and get training in the financial management system in use.

The significance of relationship building/networking outside and within the library was stressed throughout the workshop as contributing towards development of middle managers. Examples included attending formal meetings with consortium representatives and creating informal lunches with department peers.

### **Vision/Strategic Planning, Succeeding**

Due to an abundance of material and engaging conversation, time became limited and the remaining topics were fast forwarded to focus on four tips for succeeding.

- *Set realistic expectations and goals* using the acronym SMART. Goals are best when **Specific, Measurable, Attainable, Relevant, Time bound**.
- *Communicate the vision* by acquainting yourself and your staff with your organization’s mission, values, and goal as “staff must embrace the vision to move toward it” and it will be everyone’s responsibility to carry it out.
- *Manage your time well (develop good time management skills)* with five suggestions: Keep a calendar; Keep a “TO DO” list; Make appointments with yourself; Check your email on a schedule “3-4 times a day vs. every 5 seconds”; Keep a written record of what you have delegated and to whom.
- *Manage your stress* by setting reasonable expectations, nurturing outside interests, embracing a colleague-based peer group, sectioning/compartmentalizing problems, establishing a baseline/defining a routine day, and staying engaged.

Whether or not the leap to mid-management is by choice, chance, or appointment, may we take pen in

hand and begin crafting our story. As Danielle Steel once stated, “If you see the magic in a fairy tale, you can face the future.”

### **E-book Cataloging Workshop: Hands-on Training Using RDA and the Separate Record Approach**

*Marielle Veve, University of Tennessee, Knoxville*  
*Wanda Rosinski, University of Tennessee, Knoxville*

Reported by Laura Tretter

As a NASIG first timer I was looking forward to kicking off my conference with this 4-hour preconference workshop. Like many, I have been seeking out RDA training opportunities and this workshop did not disappoint.

The presenters began with a quick confirmation of the definition of an e-book, followed by an overview comparison of a RDA and an AACR2 e-book record. As expected some of the differences were specific to e-books, and some of the differences will apply more universally. It was a worthwhile introduction that leveled the ground for the group regardless of where anyone was in their individual RDA journey.

From there we looked at descriptive data fields keeping our particular focus on e-books. Moving back and forth between examples and the RDA instructions, the presenters led us through eight MARC fields. In this way we were able to examine changes in more specific detail noting RDA core elements along the way.

Next we delved into RDA relationships and the notorious WEMI, or Work-Expression-Manifestation-Item, *superfecta*. After an only mildly heated discussion about how particular resources fit within these relationships, we also touched on RDA access points and designators. In general the first half of the workshop illustrated the kind of changes that will require little adaptation. The second half of the workshop revealed where the transition to RDA will likely be more difficult for many. Catalogers will need to build a new or at least a more detailed framework of understanding and ultimately apply more discretion.

## **Vision Sessions**

### **Why the Internet is More Attractive than the Library**

*Lynn Silipigni Connaway, Ph.D., OCLC Research*

Reported by Marie Peterson

Dr. Lynn Silipigni Connaway is co-author of “The Digital Information Seeker: Report of findings from selected OCLC, JISC & RIN behavior projects” (2010), an analysis of 12 user behavior studies conducted in the US and UK, published 2005-2010. Drawing on this and other research into library systems and user information seeking behaviors, Connaway opened her provocatively-titled session with a quote from an undergraduate student regarding the ease of using Google versus using the library website. In one sentence, several facets of the problem were succinctly introduced, which Connaway delved into further throughout her presentation.

In the past, the library was central; the user concentrated his workflow around its relatively scarce resources. Now resources are abundant and increasing, but the user’s focus is limited and distracted. Libraries must build their services around users’ workflows. Acquiring information has fundamentally changed. It is no longer local, but global, not only print, but also digital, both digitized print and digital originals. Digital information is linked—a cloud rather than linear.

Users generally want convenience, often seeking just the answers, not instruction on finding them. They value human resources, though this may mean friends rather than a librarian. They do short basic searches, look at the first few results, and download information for use at a later time. They are in a hurry—power browsing to scan chunks of information—and rarely go beyond the first few pages.

Students prefer keyword searches for speed and convenience, using specific rather than broad terms. Confident in their skills, they seldom evaluate results,

gauging information as credible based on common sense. Though young users may be digitally literate, their information literacy skills lack. Most are not even searching Google proficiently.

Students generally find library websites frustrating and inconvenient. Undergraduates tend to use Google and Wikipedia first, then possibly the library website and e-journals, along with other students, friends and family as sources of information. Many view librarians as customer service representatives rather than information resources. Graduate students rely on professors and advisors, and on electronic database searches for much of their research.

Faculty and post-graduate researchers also tend to be self-taught and confident in their information literacy skills. Researchers in the sciences are more satisfied regarding access to information; in the humanities, less so. Many are frustrated by inaccessibility of e-journal content and back files, embargoes on new content, dead links, and, especially in the humanities, a dearth of information in their field. They use Google as well as databases such as Web of Science, PubMed and JSTOR, although generally, databases are not perceived as library resources. Researchers want full-text access to e-journals, and they want seamless discovery. They tend to view the library as complex, hard to use, inscrutable with its many acronyms.

Library systems should be more like search engines, the catalog as easy to use as Google. Libraries are losing the public perception battle. They need to brand and advertise their services and resources. Connaway gave as user-friendly examples the National Library of Australia's Trove and Ohio's Westerville Public Library.

Brian Matthews' article "Think Like a Startup" provided the basis for the rest of Connaway's presentation. Libraries need to pay attention to users' needs and wants. They must keep moving and changing, keep trying, and market what they do. And, simplify—lingo, signage, website, the building itself.

## Copyright in a Digital Age: Conflict, Risk, and Reward

*Kevin Smith, Duke University*

Reported by Kelsey Brett

Saturday morning began with an exciting vision session given by Kevin Smith, Scholarly Communications Officer at Duke University, about copyright law as it relates to libraries and changing technologies. As both an attorney and a librarian with an extensive knowledge of copyright and technology law, Smith advises Duke University faculty, staff, and students on issues related to copyright, intellectual property, and use of information. While academic libraries are making headlines as defendants in major copyright violation cases, it is no wonder that librarians take caution before proceeding with activities that may violate copyright law. Smith sought to provide advice and guidance about moving forward in a world where copyright law is not clearly defined. He argued that a fear of copyright violation should not dictate a library's actions. Instead, librarians should evaluate their plans against the knowledge they do have about copyright law to make reasonable decisions about how to proceed.

The onset of digital materials and the increase of technologies that makes it possible to store and disseminate digital content have created tensions between libraries and copyright holders. Library functions in the past were expected and approved of; interlibrary loan and photocopying articles for classroom use were acceptable, uncontested uses of print materials. However, the rapidly changing technological environment has caused a lack of clarity about copyright law. As Smith pointed out, copyright law is not a bright line. There is not a definitive method for copyright holders and users to determine if their actions are violating copyright law. If libraries avoid certain actions because they are unclear whether it breaks copyright law, they run the risk of overly censoring themselves. According to Smith, the possibility of institutions not offering new services for fear of violating copyright may be a bigger threat to

libraries than the possibility of being on the wrong side of a copyright infringement case.

Because copyright law is vague, it is often uncertain whether or not a particular action violates the law. For this reason, lawsuits involving claims of copyright infringement are common. Smith pointed to three topical copyright suits in which libraries served as the defendants to give context to the rest of his lecture. The three cases were Georgia State University and their use of electronic reserve materials, UCLA's use of streamed digital video, and the HathiTrust and five partners' distribution of scanned orphaned works. In Smith's opinion, a library being sued is not all bad because litigation is the way law is developed. Because copyright law cannot keep up with changing technologies, court cases will help us find out how the law is going to interpret certain activities. In the meantime libraries should not put their activities on hold while waiting for each ruling.

When a library wants to pursue an activity that could possibly violate copyright law, librarians should apply a risk and reward analysis of doing or not doing the activity. Simply not doing activities that could possibly violate copyright law is not a viable option considering the library would risk bypassing the rewards of the new activities. Weighing risk and reward, Smith suggested, is not unique to copyright matters. Libraries weigh risk and reward in all of their actions from hiring new employees to the materials it decides to purchase; activities involving the use of copyrighted materials should be no different. An audience member suggested that there actually is a significant difference in copyright risk and all other types of risk because if a library is sued for copyright infringement it could set a precedent for all other libraries. This question allowed Smith to clarify that a court ruling does not set precedent for the entire country unless it is being handed down from the United States Supreme Court. In most cases the ruling is only binding on the parties involved in the case, and if the decision comes from a district court it will be binding on the entire district. Once again, Smith stressed that fear of litigation should not determine a library's actions. Libraries should carefully weigh potential risks and

rewards and make reasonable decisions about how it will proceed in a world of unclear copyright laws.

Fair use analysis is one method for librarians to evaluate the risks of certain activities. Fair use is part of US Copyright Law, and it allows the use of copyrighted materials without permission for educational purposes. All of the defendants in the previously mentioned court cases relied on fair use to justify the legality of their actions. Because of the vagueness of copyright law, there is no definitive way to determine if a particular action will fall under Fair use unless a judge rules on it. Therefore, librarians should attempt to determine how likely their actions will fall under Fair use, based on prior litigation, and use that as a method in determining what actions they will and will not do. Fair use is a powerful defense and enables the education field to move forward with projects even if they are risky.

Another important tool that can help librarians evaluate their activities in the context of copyright law is the 'Code of Best Practices for Fair Use' published by the Association of Research Libraries. Smith clarified that this document is not a set of guidelines. Guidelines are negotiated and agreed upon by multiple parties and set minimum standards for action. Best practices are not agreed upon by rights holders. The 'Code of Best Practices for Fair Use' is librarians' interpretations of certain library practices that fall under fair use. Following this code will not necessarily prevent a library from getting sued, but it offers poignant advice concerning particular actions.

Fair use precedent has changed significantly in the past thirty years, and the 'Code of Best Practices for Fair Use' is written in light of current interpretations of fair use. Smith explained that thirty years ago, the most important question determining whether an action was fair use was its effect on the market. If the use of a copyrighted material was competitive in the market and offered a real alternative to the original work, the action was not fair use. However, more recent interpretations of fair use place more importance on the purpose of using the copyrighted work, and the amount used. The key questions are whether or not the

work is transformative and if the amount used is appropriate for the transformation. A transformative work must be different than the original, but can also be considered fair use if it is used for a different purpose, such as printing multiple copies for teaching purposes.

The 'Code of Best Practices for Fair Use' discusses several activities that the authors of the document believe are fair use. Smith agreed with several of the Code's approved activities, and advocated for libraries moving forward with them without worrying about violating fair use principles. One such activity is facilitating access for the disabled. Activities like reproducing works in braille or providing text to voice technologies for deaf patrons involve very little risk. It is very unlikely that a copyright holder would file suit against an institution that is making their materials accessible to users with disabilities. Furthermore, by not providing services for the disabled, libraries would risk being sued for violating the American Disabilities Act.

Two additional activities covered by the 'Code of Best Practices for Fair Use' and approved by Smith are facilitating text mining and including materials in institutional repositories. Text mining is becoming a necessity in academic libraries because patrons expect to be able to search for underlying materials across vast databases. Additionally, the efficiency gained by assuming that text mining is fair use outweighs the transaction costs of asking for permission to do so every time. It is likely that materials that go into open access institutional repositories incorporate bits of copyrighted materials like quotes, or more substantial items like charts or graphs. Smith argued that incorporating pieces of a copyrighted material into a new work is at the heart of transformative work. Therefore, it would be very unlikely that publishing a work in an institutional repository that includes pieces of previously copyrighted works would be interpreted as a violation of fair use.

Smith encouraged libraries to consider the risks carefully when using digital materials for teaching purposes although the 'Code of Best Practices for Fair

Use' suggests that doing so would be fair use of the material. The court cases that Smith pointed to in the beginning of his lecture all involved the use of digital materials, and ultimately the verdict is still out as to what actions are and are not considered fair use of digital content. The Georgia State case provided very little guidance in terms of where the use of copyrighted digital content in electronic reserves is going, and there is a possibility of appeal. Judges in the UCLA case involving the use of streaming video ruled that sometimes an entire work can be used, such as a video or a song, and it is still fair use but did not come to a definitive conclusion as to when doing so was fair use and when it was not. According to Smith, a general rule of thumb for determining whether using a song or video is fair use is whether or not it is instrumental in the overall argument of the work. HathiTrust's suit over the distribution of digitized orphaned works set a market failure precedent, meaning that if there is no one to pay for using the materials, then distributing it will not have an effect on the market, and it is fair use. In light of the recent litigation involving use of digital materials for teaching purposes, Smith advised librarians to tread carefully into this territory.

Smith concluded his lecture by recapping the means by which libraries should analyze their activities to determine if there is a risk of copyright violation. Librarians should look at the 'Code of Best Practices for Fair Use' and they should look at litigation. They should weigh the potential risks and rewards, and they should make well informed, reasonable decisions about how to proceed. He then suggested methods for lessening the severity of copyright restrictions in scholarly publishing such as encouraging new promotion and tenure requirements for university faculty, using creative commons licenses, and publishing in open access journals or self-archiving. Furthermore he suggested that authors stop giving away their copyrights. In the meantime, libraries should continue to innovate and move forward with new projects without letting the fear of potential copyright infringement stifle their progress.

## Is the Journal Dead? Possible Futures for Serial Scholarship

*Rick Anderson, University of Utah*

Reported by Andrea A. Leonard

Rick Anderson, Associate Dean for Scholarly Resources and Collections at the University of Utah's Marriott Library, delivered a challenging presentation that raised exciting, though uncomfortable, possibilities and questions about the future of journals and scholarly communication. Using examples such as the speedy finding of an image of Sartre that resembles his dog or asking Siri on his iPhone a reference question, Anderson drove home the point that the world of searching, retrieving, and publishing, and even the basic concept of a collection, is in flux and on the verge of radical transformation. Declaring that librarians should fear this revolution, yet publishers should rejoice, Anderson outlined the pressure points that the old scholarly communications model cannot sustain: a saturated market with more and more articles being published, most libraries with diminishing purchasing power, the waste when libraries purchase resources people don't want or need, a growing amount of readily available research data, an increasing push for Open Access mandates, and resulting challenges to copyright laws. Examples of potential upheavals in copyright law are being played out, Anderson explained, in cases such as the Google Books infringement, HathiTrust and orphan works, and the Georgia State ruling on fair use.

The e-journal ground has softened, Anderson pointed out, such that librarians can take and already have taken risks, such as questioning the Big Deals, moving to PDA/POD, and supporting the Open Access movement. Anderson exhorted us to think about what kind of organization we want to be as libraries – will we have a part in the change or will we let it happen to us? Do journals and books as formats matter anymore considering the development of “flow sites,” which could replace journals and books with dynamic online content? Such sites have the advantage of being fluid and current, but could cripple librarians' concept of

version of a record. Dynamic online content is a huge advantage for researchers, but will libraries be needed anymore? Students think about articles, not journals, and the concept of serials in general is disappearing.

Anderson warned us that the work of serialists will be quite different in the future and that NASIG as an organization will be not be the same. In order to move forward, we must think of how we can be useful in this transformation, rather than clinging to our current identities and workflow models as serialists or librarians. However, Anderson emphasized that the future will be “cool, exciting, incredibly useful and productive, but difficult to manage.” Will we step up and be a part of this transformation or will we be running to catch up?

### Conference Sessions

#### Results of Web-Scale Discovery: Data, Discussions, and Decisions

*Jeffery Daniels, Grand Valley State University  
Laura Robinson, Serials Solutions*

Reported by Kelsey Brett

Academic libraries are continuously trying to demonstrate the value of the library on campus, and make the library a starting place for researchers of all levels. A popular approach to achieving these goals is implementing a web scale discovery tool that makes searching the library similar to searching on the web. Jeffery Daniels from Grand Valley State University and Laura Robinson, standing in for John Law, from Serials Solutions, offered advice and topics of discussion for academic librarians when considering and evaluating the implementation of a web scale discovery product.

Jeffery Daniels, head of technical services and electronic resources management at GVSU, has implemented various link resolvers, ERM systems, and federated searches, as well as the Serials Solutions' discovery platform, Summon. As GVSU was the first library to commercially implement Summon, they experienced

strengths, weaknesses, and issues to consider during implementation of a web scale discovery platform. Daniels shared several of the important questions that libraries need to think about once the decision to implement a web scale discovery product has been made, such as how should the product appear on the website? Who is the audience? Should we teach it?

Before implementing Summon, GVSU had several tabs on their website. After implementing Summon, they made it the first and only search box on their website. While conducting usability tests, they discovered that younger students were still having a difficult time figuring out where to start, so they made the Summon search box even more prominent on the library website. They predicted that the primary Summon users would be young students, people who do not know what they are looking for, and advanced researchers who were searching outside of their field. They also needed to decide how and to whom they would teach the discovery tool. Instruction librarians at GVSU decided to teach Summon to freshmen and students in introductory courses, and they would begin instruction with Summon and then drive the students into more subject specific searching.

After implementing a web scale discovery product it is important to measure how well it is working by looking at usage statistics. Daniels suggested not only looking at statistics from the discovery system, full-text databases, and journal packages, but the link resolver software as well because it is taking users to the full text. Statistics showed that at GVSU, Summon was highly used compared to other resources, and usage increased every year since implementation. Full-text database and journal usage also increased dramatically, suggesting that Summon made full-text content more discoverable for users. Purchasing Summon did not justify the cancellation of any A & I's or journal packages. Daniels views this as a positive thing because Summon should drive students to more subject specific tools rather than eliminate the need for them.

Laura Robinson, Serials Solutions product manager for Summon content, expressed a desire to increase

communications between Serials Solutions and serials librarians, and encouraged librarians to provide feedback on how the company could improve their services. Robinson went on to explain the background of the development of the Summon product as well as its potential value to users of academic libraries. A research study from 2009 suggested that as library spending increases the perceived value of the library drops. Serials Solutions sought to minimize that value gap by developing the Summon product to making searching in the library more like searching on the web.

In 2011, the Education Advisory Board released a report called Redefining the Academic Library that suggested additional reasons for the gap between actual value and perceived value of the academic library. The report suggested that a library's collection size mattered less than the ease of access to the collection. The Education Advisory Board also determined that researchers no longer begin their research at the library because of viable alternative starting places like Google. It is not because students do not value the library that they rarely begin their research in the library. In fact, students believe that the library has better and more credible information than what they will find using alternative methods for research. Summon was created in response to this phenomena. Its ultimate goal was to make searching the library feel more like searching Google by indexing everything possible and giving quick access to expensive digital content. By using web scale discovery products like Summon, library users can get to resources more quickly and easily than ever before, and will hopefully begin to consider the library as a first stop for their research.

### **Evaluating Library Support for a New Graduate Program: Finding Harmony With a Mixed Method Approach**

*Philip Orr, University of Southern Indiana  
Peter Whiting, University of Southern Indiana*

Reported by Caitlin Bakker

In August 2008, the University of Southern Indiana launched its Doctor of Nursing Program (DNP), its first  
May/September 2012

and currently only doctoral program. The program was designed to be completed in two to three years and is a hybrid, combining intensive on-campus training and distance education. This new program required new initiatives and services on the part of the library, including expanded interlibrary loan services, intensive face-to-face orientation, maintaining a library presence within the Blackboard site, and new acquisitions, namely the "Nursing Nine," nine journals which were recommended by faculty and selected to meet the unique information needs of this group. In an attempt to evaluate the Rice Library's ability to meet the needs of students enrolled in this program, the library embarked upon a three year study which included a student satisfaction survey, analysis of citations in student research papers, examination of database usage statistics and the use of interlibrary loan (ILL) and article delivery services (ADS).

Of the 64 students enrolled in the program during this three year period, 78% lived more than 50 miles away from the campus while almost half lived outside of the state. The physical location of the students led the library to implement an ADS for those living 50 or more miles away from the campus. The ADS was ultimately found to be underused, with only 15 filled requests in three years, compared to 563 filled ILL requests. As a result, the library will promote both ADS and ILL through its library orientation, as well as extending ADS to other graduate programs. Furthermore, analysis of requested items will inform future collection development decisions.

The librarians analyzed 229 papers involving 4,339 citations, 67% of citations being of articles, 18% web sites, 13% books, and 1% grey literature. It was found that 71% of the materials were made available through the library and 25% of materials were freely available online. The librarians found little correlation between materials requested through ILL and ADS and those cited in papers and that analysis was abandoned after the first year of the project. As a result of reviewing these papers, the library has begun to emphasize the proper use of APA citation styles during library orientation.

The Student Satisfaction Survey allowed the librarians to assess the perceived usefulness or lack thereof of various resources. The survey was distributed by the Office of Planning, Research and Assessment at the end of the second semester and had a 71% response rate, although there was no incentive offered to participate. The students felt that CINAHL with full-text was the most useful of all of the databases, while MEDLINE was found to be the least useful. In the discussion it was noted that students may have disliked the EBSCO interface. As the majority of the students were professional nurses, nursing educators, or administrators, they would likely have practical experience with PubMed and could have found that to be a more intuitive resource. Consideration of underused resources may lead to collection decisions in which these materials are replaced. As of spring 2012, both UpToDate and the Cochrane Library have been added to the collection.

### **Teaching Wild Horses to Sing: Harmonizing the Deluge of Electronic Serials**

*Althea Aschmann, Virginia Tech University  
Andrea Ogier, Virginia Tech University  
Michael Sechler, Virginia Tech University*

Reported by Rob Van Rennes, University of Iowa

Like many institutions the Virginia Tech University Libraries began to feel the pressure of managing an overwhelming amount of electronic journal records and meeting user expectations for prompt online access. Realizing that traditional cataloging methods could never keep up with the large numbers of incoming resources, the staff began to search out ways to utilize vendor services and automate their workflows while still maintaining the integrity of the bibliographic records in their catalog.

Althea Aschmann, Head of Cataloging, stated that the library considered various solutions and contacted three other libraries that were already making use of a vendor supplied MARC record services (MRS) in an effort to learn from their experiences. In the end Virginia Tech University decided to use Serials Solutions 360 MARC



update service as compatibility was a major factor and they were already using a number of other Serials Solutions products.

In September 2011 the library began their transformation and Michael Sechler, Serials Cataloger, indicated that one of his primary concerns was maintaining the balance of high quality records while at the same time ensuring that maintenance didn't become too difficult or labor intensive. In order to accomplish this feat, the library established three working groups to guide the implementation. The first group was called Crucial Metadata Standards and was comprised of catalogers who were charged with determining what fields and information were absolutely essential to retain in the cataloging records. A second group made up of serials personnel concentrated on the processes and procedures that would be necessary to create a successful workflow. Finally, a third group of staff members from cataloging, serials, and collection development reviewed the collection and developed a list of work priorities for the staff.

Once the details were worked out, the actual process was broken down into three phases. The initial phase was tackling the low hanging fruit which consisted of overwriting approximately 6000 low quality records in the catalog. Phase two involved splitting nearly 11,000 dual format records into separate print and electronic records. The last piece of the puzzle was adding Serials Solutions control numbers into all of the remaining online bibliographic records.

Andrea Ogier, Electronic Resources Specialist, went on to explain that collaboration and communication, especially between the serials and cataloging teams, was critical to the success of the project. Equally important was thinking creatively in regards to problem solving. Ogier indicated that making use of basic scripting with the Python programming language and utilizing the MARC record software, MarcEdit, were significant in resolving a number of sticking points during their transition. She went on to say that not all of their problems could be solved with programming, but

tools such as MarcEdit and Python were extremely helpful and other librarians would be well served to learn some basic programming for their own projects.

## Honing Your Negotiation Skills

*Claire Dygert, Florida Center for Library Automation*

Reported by Valerie Bross

Honing negotiation skills takes years of experience; even such an engaging presenter as Claire Dygert could not compress the realm of negotiation into one hour. Nor did she attempt that impossible goal. What she could do in that brief time was present an overview of the process and share some tips gleaned from her years of work.

The process may, at first, sound straightforward:

- 1) Plan ahead (investigate the product, the company, your library's use of other products by the company, other possible library partners interested in the same product).
- 2) Put together a proposal.
- 3) Negotiate the deal.
- 4) Build a negotiation support system.
- 5) Assess what happened so you can learn from your mistakes.

This five-step guide masks the non-linear nature of the actuality and the subtleties of human interactions.

Barrier #1: Unlike most business situations, many of the resources for which libraries negotiate licenses are unique. The leverage that most businesses enjoy of having multiple options is not usually available to libraries.

Barrier #2: Many of the resources are offered by the STM (science, technology, medicine) market, a high profit-margin segment of the media industry which sets its expectations of profit growth at 10% annually.

Barrier #3: The perception of "negotiation" as an adversarial process often leads librarians to approach negotiation as a win-lose experience.

Addressing this last point first, Dygert recommended that librarians negotiating licenses approach the process as a mutual striving to reach agreement. To this end, she suggested that librarians adopt the “four tenets” of negotiation:

- Focus on issues (not people);
- Focus on interests (not positions);
- Create options for mutual gain;
- Use objective criteria for assessing the situation.

Using her own situation, Dygert explained how she successfully sought partnerships with community college libraries, a market that had not been available to the companies at the table, as leverage while negotiating a license.

For additional study of this topic, Dygert suggested two titles; a member of the audience suggested a third:

- Ashmore, Beth, Jill E. Grogg, and Jeff Weddle. 2012. *The librarian's guide to negotiation: winning strategies for the digital age*. Medford, New Jersey: Information Today, Inc.
- Fisher, Roger, and William Ury. 2012. *Getting to yes: negotiating an agreement without giving in*. London: Random House Business.
- Shell, G. Richard. 1999. *Bargaining for advantage: negotiation strategies for reasonable people*. New York: Viking.

### **We Have Our ERMS, It's Implemented; Why Am I Still Going Here and There to Get the Information I Need?**

*Deberah England, Wright State University*

Reported by Jennifer O'Brien

After implementing III's ERM at Wright State University, Ms. England found she was still using many different methods to maintain administrative information associated with individual resources. Basic electronic resource management systems provide resource, license, and contact records; they do not include records specifically formatted for administrative

information. In order to streamline records management and ensure ease of access, Ms. England implemented a process wherein administrative information was added to specially formatted contact records in III's ERM.

It is not uncommon for libraries to rely on several different methods of record keeping. Myriad bits of data may be found in paper files, spreadsheets, email messages, shared drives, blogs, etc. In order to better understand what libraries are doing to maintain this data, Ms. England distributed a survey via the listserv; preliminary results indicate spreadsheets and email messages are the primary storage method for administrative information (affiliate contacts, IP addresses, FTE data, workflows, licensing, manuals, systems data, usage statistics, etc.). The majority of those who responded to the survey indicated that the existence of administrative records in an ERM would influence purchase, as that type of information should be stored in an ERM.

In order to integrate this data within the ERM, Ms. England decided to utilize her system's contact records to store administrative information; the contact records in III's ERM are searchable by keyword. With some tweaking, the multi-line fields in these records were coded with new tags and titles to use with administrative data. The tags and titles for these fields run the gamut from collections to licensing to systems. Ms. England has found this utilization of the ERM has eliminated the need for a policies and procedures manual.

Prior to implementing this kind of change, consider what data is required, who has it/where it is housed, and how to collect it. Review who will need the data, and when. Is the data confidential? What is the best method of storage and access (blogs, wikis, ERM, etc.)? Determine common themes, and then draft a list of records to create.

## Managing e-Publishing: Perfect Harmony for Serialists

*Char Simser, Kansas State University Libraries;  
Wendy Robertson, University of Iowa Libraries*

Reported by Virginia A. Rumph

Char Simser and Wendy Robertson are living proof that academic serialists make sweet music in the world of e-publishing. Kansas State and Iowa follow different roads to e-publishing, but there are places along the way where the two roads merge. Iowa chose Digital Commons from bepress to host its content. Kansas State is using Open Journal Systems (OJS) as its platform. There are many considerations involved in deciding to begin e-publishing, as well as how much of the process to take on internally: open access or subscription based, staffing, campus servers or commercial hosting, software needs, technical and production support, other costs, will you charge for your services. Iowa decided to host journal content, but not become a publisher. Kansas State established the New Prairie Press to keep much more control of the publishing process in-house.

Char outlined many of the routine duties required given the e-publishing choices Kansas State has made, such as exporting DOIs to CrossRef, as well as works cited DOIs, and DOAJ metadata submissions for each article contained in the journals NPP publishes. Wendy reviewed the daily tasks necessary at Iowa that include journal set-up (such as applying for a print ISSN and an eISSN), subscription controls (following KBART, PIE-J, Best Practice for Online Journal Editors standards), scanning and creating PDF versions of retrospective content, and staying current with changes. Iowa has not tackled DOI exporting yet. She emphasized that metadata needs to be sharable, consistent, and interoperable. Statistics are provided to the site administrator, editors, and authors via Google Analytics. Char said that 95% of the job at Kansas State is troubleshooting.

Iowa and Kansas State agree on the funding and sustainability of their programs. At both institutions e-

publishing is central to the library's mission, they are committed to open access, no fees are charged to journal editors or authors, and software and staffing are funded through the library budget. Char and Wendy wholeheartedly agree that a serialist's knowledge of journals and diverse skill set are valuable assets for a library publisher. Char wrapped up with a demonstration of the author submission process, and editorial workflow at New Prairie Press. For more information on policies, procedures, and journals proposals see:

<http://www.lib.uiowa.edu/drp/ejournal.html> (for Iowa), and <http://newprairiepress.org/journals/index/about> (for Kansas State)

## Discovery on a Budget: Improved Searching without a Web-Scale Discovery Product

*Chris Bullock, Southern Illinois University Edwardsville  
Lynn Fields, Southern Illinois University Edwardsville*

Reported by Jennifer O'Brien

Through the use of extensive feedback from their patrons, librarians at Southern Illinois University Edwardsville's Lovejoy Library were able to improve resource discovery, without a third party discovery service.

In 2009, a web taskforce was formed to evaluate options for redesign of the website. Prior to implementing any changes, studies were conducted to determine how students were navigating the library website, and whether or not these students were finding the information they needed. Paper and observational studies were used.

Study results indicated students were having difficulty understanding language and linking. In addition, students had trouble distinguishing between formats when using the library catalog, did not know how to limit search results through the utilization of facets, and did not understand the difference between local and shared catalogs. Students searched using keywords, irrespective of the type of search being conducted.

There was no statistical difference between those

students who had received bibliographic instruction, and those who had not.

The library website was simplified, and VuFind was implemented, to address the discovery issues. In addition, bibliographic instruction lesson plans became far more specific, and collaborative relationships with teaching faculty were pursued.

As many factors affect search results, it is important to note that search terms, website organization, tools, terminology, database appearance, first page of results, and the ease of getting to full-text all impact discoverability. All of these factors have a significant impact on how students find and utilize library resources. To ensure students are able to find what they need, we must recognize that language, order, familiarity are very important; that search boxes will be used for any and everything; and students do not know what we know. Asking for feedback from our users can aid us in our work to simplify the discovery process.

### **Big Deal Deconstruction**

*Mary Ann Jones, Mississippi State University Libraries  
Derek Marshall, Mississippi State University Libraries*

Reported by Caitlin Bakker

In October 2011, the Mississippi State University Libraries faced the challenge of cutting the collections budget by \$500,000 in one fiscal year. Having previously cancelled all individual subscriptions, it was necessary to consider the elimination of big deal journal packages. The Library subscribed to five journal packages at this time, although only two were up for renewal in 2012: Wiley and Springer.

MSU had entered into its agreement with Wiley in 2002 as part of an EPSCoR Science Information Group (ESIG) consortial package, sharing the cost with seven other libraries and originally spending approximately \$200,000. Following the merger of Wiley and Blackwell, the library continued to pay for packages separately in 2010, but combined the packages in 2011 to spend approximately \$400,000. MSU had entered into its

agreement with Springer in 2007, also as part of an ESIG consortial package involving thirty-one other libraries. Original spending was approximately \$350,000. Tasked with drastically reducing the collections budget in a short period of time, MSU considered multiple scenarios, including the cancellation of Springer, the cancellation of Wiley, or the cancellation of both.

Usage statistics were used as the metric to determine the most frequently-accessed titles. Data was gathered for 2008 through 2011 and usage statistics were compared. The prices for both subscribed journals and consortial titles were also considered. The library determined the savings if journals with fifty or more or one hundred or more downloads were eliminated. They found that eliminating journals with fifty downloads and purchasing materials on an ad hoc basis would ultimately cost an additional \$40,000 while cancelling journals with one hundred downloads would save over \$400,000. Ultimately, the library retained approximately two hundred titles between these two packages. The library lost current access to over 2,800 titles and many smaller departments lost all of their titles from these publishers due to lower usage statistics.

In retrospect, the library considers usage statistics to be one relevant data point, but cancellation based solely on this metric can be very problematic, particularly for smaller or more specialized fields of study.

Furthermore, when considering this data point, it is necessary to ensure that all usage, including that of previous titles and publishers, be considered. Due to the short time frame, the librarians responsible for this project were not able to fully involve the liaison librarians. If time had allowed it, liaison involvement could have proved very helpful in this decision-making process.

The faculty response has been largely negative and the librarians are currently meeting with departments to discuss options for swapping titles and to provide the data and rationale for the decisions made. The library considered the possibility of reinstating those titles that

were particularly important to faculty, but ultimately were unable to find the necessary funding to do so.

## **Making Beautiful Music: The State of the Art in Mobile Technology and How We Can Make the Most of It in Libraries**

*Eleanor Cook, East Carolina University  
Megan Hurst, EBSCO Publishing*

Reported by Diana Reid

After a quick audience poll (“Did you grow up analog or digital? Do you own a smart phone? How many different electronic devices do you use in a typical day? What do you hope to learn in this session?”), the session began with some definitions to provide a context for the information they would be sharing. We learned the difference between a mobile app and mobile web site, and the pros of both as means of delivering content to users on mobile devices. Also mentioned is the evolution of the e-reader (from basic, to tablet PC, to web-enabled reader like the Kindle Fire), a different but also highly relevant mobile device. Mobile devices, we learn, are tools to amplify human effectiveness, and our libraries provide access to tools.

People, whether library patrons or not, want to easily, quickly find information wherever they are now, and then quickly access it whenever they want in the future. What is easily and quickly? It helps to think of the digital landscape in non-digital terms: newspapers were delivered to doors for convenience, to meet readers where they are at. Easily = at our digital doorstep daily, quickly = within 1-3 clicks ideally. So, “mobile” matters for libraries. In one survey, only 12% of readers borrowed their last book read from a library, and 14% began their search for their last e-book in a library. There is a big opportunity here for libraries to figure out how to push content out to users – like the bookmobile, it is still about meeting users where they are.

Mobile devices are being used ever more frequently to access the web. Growth in mobile web traffic as a percent of total web traffic is rising. In India, 40% of all web traffic is mobile (this is common in the developing

world). There are now more phones and tablets than people, and the number of mobile units shipped per year exceeds the number of computers shipped per year.

Some key trends in mobile devices: convergence of apps and mobile web sites, and computer and mobile OS’s; HTML5 is blurring lines between online and offline, providing tighter integration with devices, and more interactivity. There are also trends toward open standards, an anti-DRM movement, and the ever-present smartphone platform war. Delivery easily and quickly is easier said than done. Challenges include proprietary content formats and device types, multiple content formats, multiple platforms, DRM requirements.

The rule of the day with libraries and mobile devices is experimentation. Different devices serve different purposes, and all have a context and reason for being. They also have different complexities in terms of their use and lending in a library, as these e-readers and tablets were meant for consumers, not for library use.

This session ended on a more philosophical note, acknowledging real and profound changes in the way we think and process information along with the proliferation of ever-present digital access.

## **Vermont Digital Newspaper Project: From Reel to Reel**

*Birdie MacLennan, University of Vermont  
Tom McMurdo, University of Vermont*

Reported by Valerie Bross

This is a story of last being first. Vermont, among the last of the states to participate in the US Newspaper Project to microfilm news publications, has led the way in the new digital era. Birdie MacLennan and Tom McMurdo provided an impressive overview of the collaborative planning, team work, and sheer effort that has gone into the success of the Vermont Digital Newspaper Project.

In 2005, the National Digital Newspaper Program, in conjunction with the National Endowment for the Humanities and Library of Congress, initiated a program to provide open access to historical newspapers published in the United States from 1836 to 1922. For the curious, 1836 marks the cutoff between colonial/revolutionary newspapers, which already have digital coverage, and post-revolutionary newspapers and the 1922 endpoint ensures that the text is not under copyright. Inspired by librarians at the Ilsley Public Library in Middlebury, a coalition formed consisting of the University of Vermont, Burlington; the Department of Libraries, Montpelier (the State Library); and the Vermont Historical Society. Because University of Vermont had successfully completed other large projects, it was chosen as the lead institution for the digital newspaper project.

The coalition developed a winning proposal for funding a project to convert about 4.8 million pages of Vermont newspapers from microfilm masters to digital form. Work on the project got underway in June 2010. Of 500 titles identified as potential candidates, 59 newspapers were chosen for further review; from these, an advisory committee further narrowed the scope to 12 titles or title families representing ten of the fourteen counties in Vermont. Working in parallel, a steering committee developed an RFP for digitization.

To protect the master negatives, microfilm positives were first created from the master negatives. These are scanned and then every image is reviewed by project staff. Following the quality review, the digital files are shipped to LC for inclusion in "Chronicling America" (<http://chroniclingamerica.loc.gov/>). All of the titles have corresponding CONSER serial records.

During the ensuing discussion, Regina Reynolds revealed that US ISSN will be working with the Project to test a mechanism for batch-created ISSNs for retrospective assignment to CONSER records representing the titles in this collection. The ISSN enhancement will greatly facilitate access to this collection through link resolvers.

The URL for the Vermont Digital Newspaper Project is: <http://library.uvm.edu/vtnp/>

### **Everyone's a Player: Creation of Standards In a Fast-Paced World**

*Marshall Breeding, independent contractor*  
*Nettie Lagace, NISO*  
*Regina Romano Reynolds, Library of Congress*

Reported by Jennifer O'Brien

Publishing, formatting, cataloging, and indexing trends are all experiencing upheaval, and standardization – which may make the changes easier to weather – is an ongoing process. Three library professionals presented material on several current standardization efforts.

The National Information Standards Organization (NISO) helms these efforts to standardize. Participating community members make up many NISO committees and working groups, which work to solve common problems through the creation of standards and best practices. NISO prides itself on a few very simple ideas, striving for balance, consensus, and open process. All of these are intended to ensure that the community has confidence in NISO's output.

Marshall Breeding presented information on the Open Discovery Initiative (ODI), and Regina Romano Reynolds presented information on the Presentation and Identification of E-Journals (PIE-J).

ODI was launched in October of 2011. Its charge to develop standards and recommended practices for next generation library discovery services arose as a response to the rather chaotic method(s) of content discovery and distribution. Librarians want to ensure comprehensive coverage of content in collections – to do this, publishers and providers need to participate in the discovery process, and a holistic way of evaluating the coverage in all index based discovery services needs to be developed. The goals of ODI are to identify the needs and requirements of stakeholders, create recommendations and tools, and to provide an effective

means for librarians to assess the level of participation by information providers in discovery services.

The group is now engaged in information gathering; specific attention is being paid to levels of indexing, library rights, formats, usage statistics, and fair linking. A final draft of recommendations (including standards for data transfer, content rights, indexing, linking, usage statistics, and compliance) should be complete by next spring.

The PIE-J working group was formed in response to the ongoing issues associated with the digitization of older journal content. Incomplete holdings and unclear identification make it very confusing for both end users and librarians. Building on the CONSER guidelines to ensure clarity, PIE-J seeks to develop simple recommendations to present all content under the original title, provide accurate, complete ISSN information, include title histories, utilize numbering systems, and to standardize the provision of digital content.

Raising consciousness of the issues was the first step for PIE-J. Draft recommendations will be released for public review on 5 July 2012. Once comments have been collected, arrangements for completion and publication of the report - along with ongoing maintenance - will be finalized.

To subscribe to the NISO newslines, where you can learn how to volunteer for workgroups or committees, register for webinars, forums, or teleconferences and receive standards updates, send an email to [newsline-subscribe@list.niso.org](mailto:newsline-subscribe@list.niso.org). Type "subscribe newslines" in the subject line.

To learn more about ODI, visit [www.niso.org/workrooms/odi](http://www.niso.org/workrooms/odi).

To learn more about PIE-J, visit [www.niso.org/workrooms/piej](http://www.niso.org/workrooms/piej).

## Scholarly Video Journals to Increase Productivity in Research and Education

*Moshe Pritsker, Journal of Visualized Experiments*

Reported by Wilhelmina Randtke

New technology in scholarly communications is most often envisioned as providing faster, wider, lower cost access to traditional scholarship - journal articles, notes, etc. The Journal of Visualized Experiments (JoVE) uses technology to show experimental techniques visually, in a way that a traditional written article cannot.

The need to better illustrate experimental techniques became apparent to Moshe Pritsker while he was finishing his PhD in molecular biology. His research was delayed by failed attempts to grow a culture in his lab in Princeton, NJ, in order to recreate an experiment. Even a fellow researcher with "golden hands" could not grow the culture. Finally, Pritsker's advisor provided travel funding to go to Edinburgh, United Kingdom, to observe the research team which had conducted the original experiment. Watching the procedure provided critical details which allowed him to reproduce the experiment. As they fixed the culture, researchers warmed it slightly and revealed a few other small details which had not been described in the published paper.

Reproducibility is a huge problem in biology and the sciences. It is very difficult to transfer knowledge between labs. Recent studies in the field show that over 60% of biology research cannot be reproduced. Pritsker believes this is because of the limitations of written descriptions. To illustrate, he read a description of a scientific technique out loud, and then showed a video of the same technique. The written description included phrases like "hold at 3 o'clock" and "aspirate lightly." The video took only a few seconds, and was understandable even to the nontechnical audience.

Based on his experiences in PhD research, Pritsker pursued the idea of publishing videos showing experimental techniques. Because there was no existing

publication like this, he became involved in a start-up to produce JoVE.

JoVE publishes videos of laboratory techniques. Scientists submit proposals for 15 to 20 minute videos which summarize techniques used in experiments. Research findings are published elsewhere in a traditional scientific article format. Videos compliment articles, and are intended to facilitate recreating experimental techniques. JoVE currently accepts and produces 50 videos per month across five research areas.

When a video is accepted, JoVE schedules a photographer from the scientists' city to work with the scientists and spend about a day filming and video. Originally, some videos were attempted with scientists filming, but this could not be done because scientists had poor or inconsistent access to video equipment and found video editing frustrating.

At this time, the real costs to produce a video are about \$8,000 per video. High production costs were a key barrier to making JoVE open access, as Pritsker originally wanted. In an open access model where author fees support the journal, the highest fees currently charged are by the Public Library of Science at about \$3,000 per article – not enough to finance a video.

Despite high production costs, videos likely save money and allow some experiments to be reproduced which otherwise could not be. Pritsker was able to travel to Edinburgh to witness experiments and learn techniques for his PhD, but travel funding is not always available. Pritsker estimates that it costs about \$10,000 to reproduce an experiment in biology because of wasted time and resources for failed attempts, and travel time to view experiments. Availability of tools like videos better allows techniques to be recreated and saves money for the research system overall.

## Strategic Collection Management through Statistical Analysis

*Stephanie H. Wical, University of Wisconsin-Eau Claire*

Reported by Paula Sullenger

Wical, the periodicals and electronic resources librarian at University of Wisconsin-Eau Claire, wanted to get a picture of what academic libraries in Wisconsin are doing as a group in collecting and using usage data for electronic resources. She and her research partner, Hans Kishel, identified academic libraries in Wisconsin of all kinds, public and private, technical colleges, two-year colleges, and for-profit. They surveyed librarians they believed to have a role in electronic resource management. They emailed 139 surveys and received sixty-four completed back, for a 45% completion rate. They attribute this high return to the fact that they contacted the survey recipients to alert them that the survey was on its way and to its purpose. They conducted telephone interviews with twenty-eight of the respondents to elicit more detailed information. A few questions from both surveys are highlighted here.

The survey asked questions about the types of statistics collected and which are considered when evaluating electronic resources. Searches, sessions, full-text downloads, and cost-per-use all ranked highly for both questions. Thirty-nine percent consider these measures once a year, while twice a year, monthly, and "other" rated sixteen percent each. Seventy-four percent consider these measures to be either "important" or "very important" in decisions to renew or cancel resources and 81% report that they have canceled an electronic resource because of low use.

When asked if usage statistics are reported outside the library, 50% said they were, 24% said they weren't, and the remainder weren't sure. Inside the library, 48% said their dean/director received them, 21% said they reported them to everyone in the library, 16% said they reported to reference librarians and 11% said the statistics weren't reported anywhere.



In the follow-up telephone interviews, 68% look at cost-per-use for their electronic resources. When asked why they are using these measures to evaluate, 25% said for budget reasons, 28% because they always do it that way or because it is what they have to work with, and 18% said they wanted to get an idea of that the students are using. When asked what they should be doing with this usage data, 19% thought they should be used for making informed renewal decisions, another 19% thought they should be communicating the usage statistics to others, and 15% thought they should assess the “bang for the buck” that libraries are getting. Half of the respondents expressed some dissatisfaction with the measures used and noted that not all data is COUNTER compliant, it can’t always be looked at across vendors, and the data do not account for a lot of variables.

Wical ended her presentation with a suggestion that others conduct similar surveys in their states or consortia to help get a better view of what usage data librarians collect and the purposes these data are put to.

### **Selecting a Vendor: The Request for Proposal (RFP) from Library and Vendor Perspectives**

*Micheline Westfall, University of Tennessee Knoxville  
Justin Clarke, HARRASSOWITZ*

Reported by Kelli Getz

Micheline Westfall, Head of Electronic Resources and Serials Management at University of Tennessee Knoxville (UTK), and Justin Clarke, Regional Sales Manager at HARRASSOWITZ, presented “Selecting a vendor: The request for proposal (RFP) from library and vendor perspectives.” Westfall began by describing UTK Library’s timeline for the RFP process. The first thing a library should determine prior to the RFP, according to Westfall, is whether you are looking for a vendor that will have the lowest services fees or for a vendor that can provide an array of services for your library.

During December and January, UTK Libraries invited interested vendors for an on-site visit to give demos of

their services. The RFP went out in March and allowed six weeks for responses. In the RFP, UTK Libraries asked vendors for things such as references, how many people would be working on their account, and for EDI samples to make sure that the samples were compatible with their ILS. According to Westfall, it is also important to request a transition plan in the RFP to identify whether or not the transition would work for your library. Also, Westfall advises to have a plan in place for how to evaluate vendor responses before the responses are received.

Once the responses were received, it took the UTK committee two weeks to evaluate and select a winner. A bid was awarded, and two weeks were given for vendors to review and contest. It took nearly six weeks to issue a contract to the winner. In retrospect, Westfall feels that her timeline was too short. She recommends allowing for at least one year for the whole RFP process.

Justin Clarke concluded the session by providing information on the RFP process from a vendor perspective. According to Clarke, the norm is for most libraries to request demos after the RFP is received in writing. To be courteous to the vendors, Clarke advises giving vendors advance notice that a demo is requested so that travel arrangements can be made for an on-site visit. Also, libraries should send an agenda at least one week prior the meeting so that vendors can tailor their demos to a library’s specific needs.

Additionally, it is helpful to provide an electronic copy of the RFP as a Word document so that vendors can directly insert their responses into the document. Clarke suggests proof-reading the document before it is sent out to avoid duplicate or outdated questions. It is also important to include information such as your FTE, Carnegie Classification, and any consortial agreements in the RFP since this information could affect vendor responses. Clarke advises against requesting title by title comparisons in the RFP since publishers control the price, not the vendors. Lastly, Clarke agrees with Westfall in that the library needs to decide prior to the RFP whether price or services offered is the deciding factor.

## Discovery and Analysis of the World's Research Collections: JSTOR and Summon under the Hood

*Laura Robinson, Serials Solutions*  
*Ron Snyder, JSTOR*

Reported by Janet Arcand

Laura Robinson of Serials Solutions spoke about her company's Summon Service, introduced in 2009, which was the first, and is still the most widely adopted, web-scale discovery service on the market. It was developed to handle a market problem for libraries: behavior studies showed that researchers did not know what content their library owned and found library access difficult to navigate. Libraries have licensed and paid for a wealth of content that goes vastly underutilized because the library is not the first choice for researchers beginning a search. Summon provides a single box search that promotes the role of libraries in the research process by providing a simple and fast starting place. The library's licensed content and other data are pulled into Summon's single unified index, where it is pre-harvested and mapped to give quick results in a relevancy-ranked list where results are boosted based on factors such as content type, local access, date of publication and geographic location. There are over a billion records in the Summon index, including 7 million full-text books with deep indexing. Native search language functionality has been created for seventeen languages. The researcher's past search history can be used to automatically scope to their favored subject disciplines.

Ron Snyder of JSTOR also discussed researcher behavior analysis. JSTOR is overhauling its search infrastructure this summer, based on data analysis. The company has the capacity for ingesting organizing and analyzing billions of usage events since JSTOR's start-up in 1997. Trends show that users are being trained by Google to use simpler searches instead of the advanced options available: three to five terms are generally entered, and quotes and Boolean searches are not much used. Users tend to finish their search after seeing the first page of results, and to assume the first item on the list is the most relevant because it was produced by a search

engine they trust. JSTOR has a Local Discovery Integration (LDI) pilot project and is working with Summon as well as other companies. The concept is to reach users at their research starting point and build their awareness of the best resources available for them, purchased for them by their local libraries. "Links out" have been embedded at strategic places in the JSTOR search results pages, which inform the user of options to change their search. The highest usage of these links in the pilot has occurred at the zero results page. Assignment of subject "disciplines" to articles is proceeding using a generative probabilistic model, Latent Dirichlet Allocation (LDA), which models semantic relationships between documents based on word co-occurrences. Representative documents from each JSTOR discipline are being used to develop topic models.

### Struggles and Solutions with Providing Access to e-Book Collections

*Valeria Hodge, University of Tennessee, Knoxville*  
*Maribeth Manoff, University of Tennessee, Knoxville*  
*Gail Watson, University of Tennessee, Knoxville*

Reported by Sharon K. Scott

In the early days of electronic book purchasing and processing at the University of Tennessee, Knoxville, the two main methods utilized were the purchase of "collections," such as NetLibrary, beginning in 2001, and the introduction of individual title purchases from various vendors around 2007. The volume of both types of purchases increased through the years, with more than 80 packages and 1200 individual titles handled in the past year. The original workflows put in place to handle this material were no longer viable, due not just to the additional volume but also to the increasing complexity and record-keeping of transactions.

Three primary aspects of the e-book process were examined: increased acquisitions to assure the patrons' needs are met; maintaining cataloging and link management to provide the best possible access; and records management to keep accurate information on transactions.

The selection of individual e-books was refined somewhat to focus on acquiring titles as requested by subject specialists, purchasing of e-preferred approvals, and utilizing patron-driven access.

An E-book Committee was formed to address issues of cataloging and access. Notes for the patrons relating to terms, conditions, and access were formulated and became part of the catalog record; to alleviate the increased workload, some records were purchased from YBP.

Through reliance on YBP files and data, and the development of local processes to work within the ALEPH library system, many of the manual procedures related to records management could be discontinued.

### **Mobile Websites and Apps in Academic Libraries: Harmony on a Small Scale**

*Kathryn Johns-Masten, State University of New York at  
Oswego*

Reported by Sanjeet Mann

As reports from the Pew Internet and American Life project demonstrate, demand for mobile access is growing among users of academic libraries. Kathryn Johns-Masten explained how Penfield Library at SUNY-Oswego is meeting the challenge by developing a mobile interface using the iWebKit framework.

Johns-Masten emphasized that careful planning precedes the implementation of a mobile site. Oswego librarians began by asking who would visit their site and what type of smartphones visitors might use. They compiled a literature review, solicited advice from their student advisory committee, conducted focus groups, and collected examples of effective sites at other academic and public libraries. Penfield's mobile site now includes catalog access, research guides and social networking, with plans to add access to digital collections, surveys, and library instruction material.

Johns-Masten advised libraries considering a mobile site to start small and add features gradually. Frameworks

such as iWebKit, Boopsie or Springshare Mobile Site Builder can simplify the technical complexity involved; some frameworks are free or low cost. Utilities such as Skweezer, MobiReady and W3C Mobile OK Checker simulate the experience of viewing the existing library website on a mobile device and identify formatting errors. As an audience question elicited, many librarians rely on devices personally owned by themselves or their users to test mobile interfaces; utilities that simulate a mobile browser on a desktop computer are a valuable addition. Student focus groups and user task protocol testing help ensure the design team is on the right track. Surveys and usage statistics can assess the effectiveness of the mobile site during and after implementation.

Frameworks can help librarians craft mobile versions of their websites, but OPAC and database mobile interfaces are largely under the control of vendors. Most ILS vendors now provide mobile interfaces, often at an additional cost. Johns-Masten noted that ILS user groups and listservs provide missing code and expertise. Many database apps and mobile sites are in their first years of existence or still in beta. The question of whether to introduce these untested interfaces to students is a matter for debate. Johns-Masten personally supported the "introduce them to everything we have" view while acknowledging the differing perspectives of public services librarians, technical services librarians and vendor tech support staff.

### **CONSER Serials RDA Workflow**

*Valerie Bross, UCLA  
Les Hawkins, Library of Congress  
Hien Nguyen, Library of Congress*

Reported by Virginia A. Rumph

This presentation was broken into three sections: Program for Cooperative Cataloging (PCC) RDA decisions, RDA cataloging documentation/tools, and Training plans. Les began with the information that PCC support for the decision to implement RDA necessitated forming task groups to investigate, identify, and explore issues related to the transition. Out of that decision

grew PCC's goal of focusing on developing RDA NACO training. The task group's work began in 2011. That work group made decisions about best practices for RDA bibliographic and authority records, 'acceptable' AACR2 headings, and guidelines for working with RDA and AACR2 records and new MARC21 fields. Decisions also had to be made about LC/PCC policy statements, provider-neutral policies in RDA context, training materials and record examples, and by the CONSER Standard Record Task Group.

Valerie focused on cataloging documentation and tools. The tools developed are the CONSER RDA core elements spreadsheet, CONSER MARC21-to-RDA table, and the CONSER RDA cataloging checklist. The RDA checklist consists of a getting started decision tool, a tree diagram, and editing instructions. She emphasized that these three tools reflect PCC decisions, include standard CONSER record guidelines, and are works in progress. The PCC web pages are being reorganized, and will have new URLs. These websites include a public forum for feedback and collaboration (for instance, on examples from PCC for use by members of the serials cataloging community). Also, RIMMF (RDA in Many Metadata Formats) is being created as a visualization training tool to help catalogers get used to thinking of RDA instead of AACR/MARC; at <http://www.marcofquality.com/rimmf/doku.php>

Hien gave an update on training plans and materials. She highlighted two training plans that will be available: the LC RDA training which will be very intensive and time-consuming; and the North Carolina State University training plan which will be thorough, but will not require such a large time commitment. The core RDA training will consist of FRBR, the Toolkit, Authority, and Descriptive elements. All PCC RDA learning resources will be available on the CLW website (clearinghouse of RDA materials), and the CONSER website. The plan will involve documentation for serials, training, and revision of the CONSER manuals. The CONSER training plan will consist of 'bridge' training (available fall 2012) on transitioning from AACR2 to RDA, and basic RDA serials cataloging (available early 2013). Hein also laid out the training delivery options

using the NACO Model in which materials will be created for use as online presentations, in classroom training, as video components, and for self-study.

### **ROI or Bust: A Glimpse into How Librarians, Publishers and Agents Create Value for Survival**

*Gracemary Smulewitz, Rutgers University Libraries  
David Celano, Springer  
Jose Luis Andrade, SWETS Americas*

Reported by Kelli Getz

Gracemary Smulewitz, Head of Distributed Technical Services at Rutgers University Libraries (RUL); David Celano, Vice President, Library Sales for Springer; and Jose Luis Andrade, President, SWETS Americas, presented "ROI or bust: A glimpse into how librarians, publishers and agents create value for survival." Smulewitz began the session by describing how RUL was facing extensive budget cuts and cancellations over the past year. She was under pressure to make an informed decision about which titles to cancel. In order to weed out poor performing journals, she first cancelled delayed or ceased titles. Next, she created a title list in an Excel spreadsheet and incorporated the usage statistics for the past five to six years, the impact factor, and the Eigen factor for each title. She also had her selectors analyze every package title by title to see if low use titles could be swapped out. Lastly, she cancelled the print title where e-journal usage states were overwhelmingly greater. Smulewitz does admit that this analysis was formulaic and little was done to determine how or why a journal was being used or not used.

David Celano of Springer discussed how publishers can create value for libraries. Publishers can find out information for a library such as basic downloads over time, percentage of usage by subject area, and which titles through the Big Deal are historical subscriptions and which are access via consortial agreements. Additionally, publisher Account Development Departments will meet with librarians after a purchase to figure out ways to market products to patrons. Publishers are doing things to increase value by

improving the quality of journals by going after top-notch authors and by offering open access options.

Jose Luis Andrade of SWETS concluded the session by discussing that agents and libraries have the same goal of facilitating quality education, although they go about achieving the goal in different ways. Agents can help libraries by providing COUNTER compliant statistics for journals and e-books, cost per use data, and help libraries by finding out information such as a journal's impact factor. Agents show relevance by developing solutions for customer imperatives.

### **CORAL: Implementing an Open-Source ERM**

*Andrea Imre, Southern Illinois University Carbondale  
Eric Hartnett, Texas A&M University  
Derrick Hiatt, Wake Forest University*

Reported by Eugenia Beh

CORAL (Centralized Online Resource Acquisitions and Licensing) is a free, open-source electronic resources management (ERM) system, consisting of four modules (Organizations, Licensing, Resources and Usage Statistics), that was developed by the University of Notre Dame's Hesburgh Libraries in 2010. The speakers for this session represented a library from a medium-sized, public, research university (Southern Illinois University Carbondale), a large, public, research university library (Texas A&M University), and a library from a small, private university (Wake Forest University).

Andrea Imre, the Electronic Resources Librarian at Southern Illinois University Carbondale, spoke first about SIUC's process in implementing CORAL. Prior to CORAL, SIUC used such commercial products as Voyager, SFX, EBSCONet and LibGuides, in addition to Excel files, e-mail messages, personal and shared computer folders, and file cabinets to manage its electronic resources. What SIUC wanted was a user-friendly, web-based, centralized database to store licenses and vendor information that could also check the status of new orders and eliminate potential workflow gaps. SIUC chose CORAL due to its limited

staff and resources for implementing an ERM, CORAL's modular infrastructure, which allows implementation to be phased-in, CORAL's easily accessible web interface, and the ability to set up a workflow management system.

Andrea installed three modules in October 2011, beginning with the Licensing module, the Resource module, and the Organizations module. However, she has not yet implemented the Usage Statistics module or the Terms toolkit, which connects licensing terms or "expressions" in the Licensing module to an open-URL link resolver. Since the Licensing module was Andrea's greatest priority, she implemented it first rather than the Organizations module, as is suggested by Notre Dame. Andrea and a member of the Acquisitions staff scanned in all of the paper licenses and uploaded the digital licenses and entered most of the data for the Resources and Organizations modules, in all adding 73 licenses and 125 resource records. In addition, Andrea set up a system for managing SIUC's workflow in the Resources module that consisted of six acquisition types and four user groups.

The benefits of CORAL for SIUC include the lack of annual/subscription fees; a simple interface; the ease of installation, and the ability to meet the SIUC library's need for a centralized storage system for e-resources contact information. It also allowed Andrea to organize licensing information and to set up a workflow management system. However, as Andrea found, CORAL is not a replacement for SIUC's existing tools, as was hoped, and it also requires a great deal of manual data entry, at times, duplicating information in other sources. Due to limited staff and implementation time, it has also been difficult to get staff buy-in. Finally, there is no customer service, leaving Andrea to rely on the library systems staff and feedback from the CORAL listserv to troubleshoot technical problems. Still, overall, Andrea views CORAL positively, and in the future, she plans to continue populating the modules, establish workflow routines for renewals, and implement the Terms toolkit to share licensing information with patrons and staff members through SFX.

Eric Hartnett, Electronic Resources Librarian at Texas A&M University, spoke next about the TAMU Libraries' implementation process. Prior to CORAL, Texas A&M University attempted to implement Ex Libris's Verde, a commercial ERMS. However, Verde did not work as advertised and was dropped. After Verde, the TAMU Libraries tried GoldRush, but it proved to be too simplistic for the Libraries' needs, and is now only used for Texas A&M System subscriptions.

At the 2010 ER&L Conference, Eric and the Coordinator for Electronic Resources attended a session on CORAL, and they liked what they saw. At the time, the TAMU Libraries' IT department was unable to implement CORAL, because they did not support PHP. However, in 2011, the Libraries IT department was able to support PHP and the TAMU Libraries decided to implement CORAL as its ERMS.

Eric was put in charge of an implementation team of four librarians and one staff member. As with SIUC, the TAMU Libraries team implemented only three of the four modules: Organizations, Licensing, and Resources, in that order. The team decided not to implement the Usage Statistics module because it only accepted JR1 and JR1a COUNTER-compliant reports and was not compatible with SUSHI.

Before implementing each module, Eric tested and customized the fields for functionality and then met with the implementation team every two weeks. The team implemented the Organizations module from April to June 2011 and created over 1,000 records; the Licensing module from July to August 2011, creating over 300 records (roughly 700 license documents), and the Resources module from August 2011 to the present, creating over 3,300 records.

While implementing the modules, the team had to decide what to enter, the naming structure, what licensing expressions to gather, and what to do about journal packages, free resources and cost data. For the Organizations module, the team decided to enter the names of all publishers, vendors, consortia and TAMU campuses as full names, with acronyms as aliases. For

the Licensing module, the team entered all of a publisher's products on one license record, with a separate record for each product, and gathered the following expressions: authorized users, interlibrary loan, coursepacks, e-reserves, termination/cancellation, perpetual access, and fair use. For the Resources module, the team entered individual journal subscriptions, individual e-book purchases, databases, datasets and trials, while journal packages were entered on one record, with the title lists uploaded as PDFs or Excel spreadsheets. The team decided not to enter either free resources or cost data, instead relying on Voyager for the latter.

Thus far, Texas A&M University is happy with CORAL as a central location for storing documents and as a way to simplify license information. However, the Libraries still has to use separate products for usage statistics and for cost data, and the team has yet to use CORAL to improve the Libraries' workflow. In addition, there are definitely areas for improving CORAL, including the ability to add custom fields and to list contacts by the order of importance, instead of alphabetically. Eric's future plans include implementing the Terms toolkit (as with SIUC), using CORAL as the backend of the Libraries' mobile site and A-Z list, storing permissions for the TAMU institutional repository, and installing a separate instance of CORAL for TAMU System subscriptions to replace GoldRush.

Derrick Hiatt, Electronic Resources Librarian at Wake Forest University, spoke last and described Wake Forest's approach to implementing CORAL. Unlike SIUC and Texas A&M University, Wake Forest did not have an ERMS prior to CORAL, but Wake Forest has been traditionally open-source friendly, for example, using the open-source course software system, VuFind, and employing a static XML file to drive the library's public-facing A-Z database list.

In 2010, at the same ER&L conference that Eric Hartnett mentioned, Derrick also attended the session on CORAL and was struck by its clear user interface, modular installation and easy administrative configuration. In August 2011, Derrick installed CORAL with the help of

**What's Up with Docs?:  
The Peculiarities of Cataloging Federal  
Government Serials Publications**

*Stephanie A. Braunstein, Louisiana State University  
Joseph R. Nicholson, Louisiana State University  
Fang H. Gao, Government Printing Office*

Reported by Jennifer O'Brien

the web librarian. Instead of manually populating each module, Derrick and the web librarian mapped data from the XML file that drives the library's A-Z database list into the CORAL database. (For more details on how that works, please contact Derrick!)

Although the data transfer was not perfect (for example, the transfer did not capture parent/child relationships, such as Chadwyck Healey and ProQuest), overall, it was successful, albeit with some additional clean-up, which involved re-mapping the XML <Format> field into the Resources module's Type field; fixing high used databases; adding parent/child relationships; normalizing database names and adding consortia names.

Currently, Wake Forest is using CORAL to track e-journals at the package/platform level, but not individual e-journal titles (as with Texas A&M University). Only a few packages are in CORAL right now, but Derrick is gradually adding more as the need arises. In addition, Derrick hasn't yet entered Contacts or Role(s) for most organizations in the Organizations module, with the exception of contact information for larger or frequently-contacted vendors, but he is adding more as he goes along. Derrick is also entering new licenses, but he is not yet adding existing licenses to CORAL, as the library already has a networked drive for licenses. (So far, Derrick is the only one working on CORAL.)

Thus far, Derrick has entered 248 Resources records and 137 Organization records, and plans to focus on setting up the workflow routing process as his next priority. He also wants to use CORAL to track purchase requests, but the functionality doesn't appear to be there yet. He also hopes to eventually use CORAL to drive the public A-Z database list, as Eric plans to, and as with SIUC and Texas A&M University, Wake Forest needs to explore the Statistics module further.

The primary purpose of cataloging is to ensure access. Clear, concise cataloging records make access that much easier. Serials cataloging relies on a high level of specificity. When cataloging government documents serials, however, it can be difficult to determine whether they are true serial publications. This can be frustrating for both librarians and users.

In addition to providing publishing and printing services for all three branches of the federal government, the Government Printing Office (GPO) is the authority for the cataloging of U.S. government publications. The GPO creates cataloging records for these publications, which are then housed in depository libraries. Arrangement of depository materials is expected to conform with accepted library standards. These standards may be found in the Federal Depository Library Program Handbook.

Currently, 46,999 serials (live and ceased) are available in the Catalog of Government Publications. Of those, 32,494 are live; 15,726 are online; and 31,273 are available in tangible formats (including micrographic formats, CDs and DVDs, print, etc.). The dynamic nature of serials, compounded by these multiple formats, can create confusion during the cataloging process.

At Louisiana State University Libraries, the GPO's use of a separate versus single record cataloging approach made it difficult to reconcile catalog records. In the past, the GPO utilized a single record approach for the cataloging of serials publications. In 2008, the separate record cataloging policy was implemented. This change in procedure made it difficult for LSU to identify title changes, seriality, place of publication or printing, and responsible agencies. LSU Libraries also noted the

irregularity with which GPO serials were issued made creating receiving patterns for check-in records difficult. Cataloging of monographic series by the GPO was not always consistent, resulting in puzzling catalog displays. While use of the MARCIVE cataloging service lessened the workload, the inconsistencies were frustrating.

To alleviate this frustration, LSU implemented new procedures. First, they decided to use a single record approach for heavily used serials. Second, they periodically run reports to identify serials records requiring additional attention (e.g. monographs cataloged as serials, title changes, etc.). It is important to note, however, that perfectly consistent GPO serials management is not a possibility for them - LSU Libraries strive to be balanced yet flexible in their approach; they strive for coherence, but accept a certain level of cognitive dissonance (notes fields may be found in abundance!). At the most fundamental level, the needs of the user dictate record management and display.

The GPO makes every effort to announce entry changes for government serials in WEBTech Notes. This includes new SuDocs and item numbers for agencies, bureaus, and publications; ceased classes and item numbers; and format changes. Questions about additional elements of catalog records may be submitted to askGPO.

Separate Record Cataloging Policy may be found at <http://fdlp.gov/cataloging/121-separaterecordcataloging>

The URL for askGPO is <http://www.gpo.gov/askgpo/>

### **A Model for E-Resource Value Assessment**

*Sarah Sutton, Texas A&M University-Corpus Christi*

Reported by Paula Sullenger

The current budgetary climate is forcing libraries to be more selective about e-resource purchases and renewals. Sutton has developed a model for assessing the value of these e-resources using a combination of content coverage, usage data, patron needs and feedback, and costs.

The model is based on four elements: COUNTER-defined searches, session, and full-text downloads, and link out information supplied by their serial content management vendor. Taking these four elements, Sutton picked out the twenty resources that had the most searches, the twenty resources that had the most sessions, the twenty resources that had the most downloads, and the twenty resources that had the most link outs. Five resources fell into all four elements but she felt this was not enough to form a baseline. She then picked out the ones that fell into three of the four elements and ended up with eleven resources. She averaged the cost-per-use for each element to form her baseline for comparison. She noted that she is not really using the link out data right now because she only has one year's worth of data.

Sutton looks at each electronic resource and its cost-per-use figures to see if it compares favorably to the baseline. Sometimes the comparison yields an easy "yes" answer and she moves on. Sometimes the comparison yields an easy "no," such as when the baseline cost/FTD is \$0.36 and the resource's cost/FTD is \$20.37. The more common result is that the resource needs further analysis.

A major component of this further analysis is to look at overlap data, which she gets from her link resolver product. Sutton shared one example of a resource with decreasing usage over a two year period where the overlap analysis showed the 89.4% of the titles in that resource are unique. Another resource's overlap analysis showed that 85.3% of its titles were duplicated. Other factors she takes into consideration are: core title lists, citations in theses and dissertations written at her campus, use in course reserves, faculty publications and faculty requests.

A member of the audience noted that the model only considers quantitative data. Is qualitative data ever used? Sutton said she would certainly want to speak to users before actually making cancellation decisions. Another person noted that the baseline resources used all look to be interdisciplinary. Should there be different baselines for different disciplines? Sutton said this was



something she should look at. Another person asked about the staff time and overhead involved in this kind of analysis. Sutton said that once the model is built it doesn't take much time to analyze the data.

### **Exercising Creativity to Implement an Institutional Repository with Limited Resources**

*Cathy Weng, The College of New Jersey  
Yuji Tosaka, The College of New Jersey*

Reported by Janet Arcand

The College of New Jersey (TCNJ) is a small institution serving approximately 6000 students, mostly undergraduates. Library staff saw the need to create an Institutional Repository (IR) in order to manage, organize, and showcase the intellectual output of the academy community, both faculty and students, to a broader audience, and thus demonstrate the College's quality. Smaller institutions face issues of limited funding, staffing, expertise and support when setting up an IR. Some options which were eventually rejected were joining a consortial IR, or outsourcing the IR to a platform hosted by a vendor or by a bigger academic institution. The option which the library finally chose was to develop an independent IR based on an Open Source System.

The library obtained a competitive grant from TCNJ's Mentored Undergraduate Summer Experience (MUSE) program, to involve two computer science students, along with three librarians, in creating a pilot IR during eight weeks in the summer. This was the first MUSE grant for which the library had ever applied, and it allowed the library to participate in academic mentoring, and recognized the library community as part of the research community.

The library chose IR+ (irplus), developed at the University of Rochester, as their platform, and chose to have a physical server at their site because it would give their students the experience of learning server administration. Publications by the faculty of the library and the Chemistry Department were selected for the pilot project's content building, and the team used

SHERPA/RoMEO to check for information on posting articles and for copyright management. The pilot was successfully implemented and 70 records created. One of the project's computer science students was able to contribute local enhancements, such as a more intuitive metadata creation process, to the IR+ version 2.1 general release.

The library's ultimate goal is to have a permanent and sustainable service, with support from the library administration and faculty in promoting this as a new type of library service. Policies and procedures will be developed so that the work can be assigned to a paraprofessional in the future. The library Dean has obtained funding to hire a student for future IR development. The library had already used the Open Source product CORAL (Centralized Online Resource Acquisitions and Licensing), developed at Notre Dame, as their ERMS. They are now testing it to use for copyright management for their future IR needs.

The presenters advised colleagues with similar needs and limited resources, to be flexible and think like a start-up, and to formulate a plan for "good enough" functionality, instead of aiming for perfection.

### **Bringing History into the Digital Age: A Case Study of an Online Journal Transition**

*Caitlin Bakker, Wilfrid Laurier University*

Reported by Laurie Kaplan

Caitlin Bakker described a successful project at Wilfrid Laurier University that transitioned a print only journal, published by the University Press, to a print and electronic journal. The Canadian Military History Journal (CMH) has been in print since 1992, with quarterly updates, but had no electronic component. The Department of History, seeing shrinking subscriptions from 2010 (530) to 2011 (480), knew something had to be done to bolster this specialized journal with its well-known contributors. There was resistance to electronic publication from the staff of the journal due to a perceived lack of quality online, and the big question

was how to maintain prestige while increasing readership and recognition.

A joint venture, the first of its kind at the University, was proposed between the Laurier Library and the WLU Press to transition the publication to an online format through [ScholarsCommons@Laurier](mailto:ScholarsCommons@Laurier), “a digital repository of academic work that serves as both a research tool and a showcase for faculty and graduate students” ([http://www.wlu.ca/news\\_detail.php?grp\\_id=36&nws\\_id=8472](http://www.wlu.ca/news_detail.php?grp_id=36&nws_id=8472)). Funding was available from the University and from a grant from the Social Science and Humanities Research Council. In Caitlin’s view, the most important part of the project was putting by-laws and policies in place, in writing. The by-laws would govern the internal working relationships, and the policies would govern the relationships with the authors, reviewers, editors and readers, including manuscript submission, copyright agreements, Editorial Board policies, and subscription policies. While this may sound daunting, and while there was resistance to the idea of having to document everything in such a small organization, the final document, including both the by-laws and policies, was only 10 to 12 pages long and has proven to be instrumental in setting expectations. Issues around the look and feel of the website were tackled much later in the process.

On the issue of copyright, it turned out that the print magazine did not own the copyright to the articles from 1992 to the present. The presumption that submission equaled transfer of copyright was not actually true. In order to include these articles online, all of the authors had to be contacted – and there were no email addresses. In the end, 113 authors were contacted and 110 gave CHM non-exclusive permission to distribute the content, an agreement that was more likely to have a positive end than copyright transfer. Of the 3 refusals, two are working on updates and will likely give permission once they are done; the third had not cleared third-party copyrights. Some content still cannot be included, so more work continues. Transfer of copyright is now in place for all new articles, with

both a click-through agreement and a form to be signed upon receipt of proofs.

The online content is Open Access – Gratis with a 2 year moving wall. There is a subscription model for revenue, and the online version tries to mirror the print. Advertising, author pays, pay-per-view, and incremental publishing were all rejected as sources of revenue, but will be reviewed again in the future. Caitlin and the team from Laurier Library and WLU Press felt it was easier to work with an existing journal and add the online version by building on the existing subscriptions and established prestige. There was also a group of core contributors and editors, and an existing list for advertising the new site. The website does expose the metadata and keywords to enhance searching the site, even if the content is still behind the moving wall.

Key take-away points from the presentation were:

- E-pub is not simpler or easier than print
- A critical mass of high quality material helped launch the site
- Well-formed metadata and keywords should reflect the content
- It is a long-term investment of time and energy
- Having statistics to confirm increased usage helps remove resistance
- And you succeed with sheer luck!
- And then you embark on additional (3 current) projects.

### **Automated Metadata Creation: Possibilities and Pitfalls**

*Wilhelmina Randtke, Florida State University Libraries –  
Law Research Center*

Reported by Marsha Seamans

As a graduate student in the MLIS program at Florida State University, Wilhelmina Randtke undertook a project to provide indexing for the digitized pages of *The Florida Administrative Code, 1970-1983* utilizing automated indexing and automated metadata creation.

The presentation started by emphasizing that computers are good at making black and white decisions, but cannot really use discretion. For instance, 1 trillion documents were indexed in Google over a 4 year period. Human indexing is alive and well, especially on shopping sites where people are trying to sell stuff. On any site, it is not always clear if the metadata is machine- or human-created or a combination of the two. Indexes may use or re-purpose existing metadata.

There are highly technical automated ways to assign subject headings with computer code. Some examples investigated by Ms. Randtke for her project were: Apache Unstructured Information Management Architecture (UIMA), Grid Analysis of Time series Expression (GATE), and Keyphrase Extraction Algorithm (KEA).

In an automated indexing project, the person's role is to select an appropriate ontology, configure the program, and review the results. The computer program uses the ontology or thesaurus and applies it to each item to create the subject heading metadata. For library projects, both library and information technology personnel need to be involved.

For *The Florida Administrative Code*, giant sets of PDF files were processed using batch OCR in Adobe. A-PDF to Excel Extractor was used and rules were created using Visual Basic.

In summarizing how to plan a project such as this, Ms. Randtke suggested looking for patterns, writing step by step instructions about how to process the files, and keeping in mind that computers cannot apply discretion. In writing the program it is important to identify appropriate advisors, read material on coding, and keep in mind that the index is the ultimate goal. The last step in the process is to do an audit of missing pages or missing metadata. Tasks included in the project included: database work, digitization, auditing, manual metadata creation, and automated metadata creation.

Ms. Randtke's presentation included a brief demonstration of the search that she built to retrieve pages from the Florida *Code* as the page appeared on a specific date over a 20 year period.

## **Practical Applications of Do-It-Yourself Citation Analysis**

*Steve Black, College of Saint Rose*

Reported by Sanjeet Mann

Steve Black defined citation analysis as the study of patterns in the frequency by which works are cited in other sources. This technique can help librarians identify journals for addition to the collection, support researchers at their institutions, or locate promising venues to publish their own research.

In this session, he taught attendees how to use references exported from an indexing database to analyze citations of a specific journal, faculty author or other subject. Black's method is low cost, flexible enough to meet a variety of assessment needs, provides quantitative data to complement a library's qualitative evaluations, and produces publishable results.

Black's overall procedure involves choosing the population to be studied (journals, people, articles on a given topic, etc.), selecting a representative sample, compiling the list of works cited by the sample, and sorting and ranking those works. Black provided an example taken from his *Psychological Reports* article on this topic. He examined a sample of articles from six forensic psychology journals published between 2008 and 2010, to determine which other journals their authors cited most frequently. He used PsycInfo to run searches limited to the desired journals and dates, saved articles to folders according to the issue in which they were published, and exported the citations from each folder's articles to Excel, where they were sorted according to journal title and ranked by the number of times each journal was cited.

To evaluate the reliability of his findings, Black calculated the coefficient of variation (standard deviation/mean) to determine whether the propensity of authors to cite a particular journal was consistent from year to year, and used Spearman's rho rank correlation to determine how much each journal's ranking changed during the three years of his sample.

The sample size required depends on the reason for carrying out a citation analysis. Black suggested that a sample of less than 1,000 items could identify the top journal in a field, samples of less than 10,000 items could indicate the lead journals in a specialized area of study, and samples larger than 10,000 items will yield a very significant ranked list. Smaller studies can be conducted with the assistance of a student worker, and are suitable for supporting departmental program reviews or assisting faculty up for promotion.

Black concluded by summarizing the strengths and weaknesses of his method: it provides objective data and can analyze interdisciplinary research, but it requires a lot of citations, and many databases do not allow easy exporting of references. He advised attendees looking to publish a citation analysis to choose a topic not reported on in ISI Journal Citation Reports, to run a thorough literature review and a pilot test first, and to publish in a disciplinary journal rather than a mainstream LIS publication.



## Who Uses This Stuff, Anyway? An Investigation of Who Uses the Digital Commons

*Andrew Wesolek, Utah State University*

Reported by Sharon K. Scott

The digital commons developed at Utah State University and currently hosted on the bepress DigitalCommons platform, is now in its fourth year of existence, housing more than 20,000 documents relating to research conducted at the University, and experiencing over 500,000 full-text downloads since its inception. Three guiding principles have contributed to its success: offering “we do it for you” service, identifying ways the IR can fill campus needs, and working proactively at “being present.”

Efforts began to focus on collecting information that is in demand; to do this, a clearer picture of the end user needed to be developed. A 1-minute survey was created and made available on the Digital Commons from Nov. 2010-Jan. 2012. Major components of the survey included the participant's primary role (graduate student, faculty, citizen, etc.), purpose of access (research, teaching, curiosity, etc.), method of finding material (Google, USU library catalog, other search engine).

Results showed that graduate students, followed by undergraduate students, and then “interested citizens” were primary users of Digital Commons. The most common reason for accessing data was research; interestingly, just satisfying curiosity was second. Google far outweighed other sources as a method of finding material.

Future directions of the IR may include more focused collection development for research; more outreach to the public, as indicated by their use and interest in the IR, may also be indicated.

### Bob Boissy

Kathryn Wesley, Profiles Editor

One of the great things about NASIG is that we have members from all segments of the scholarly communications spectrum. Bob Boissy, our president for 2012/13, has spent his post-MLS career on the commercial end of that spectrum, first with a vendor, later with publishers. He's worked with technology, licensing, information standards, and developing relationships between vendors, publishers, and libraries. He's smart and creative, and one of the quickest-thinking, wittiest guys you will ever meet.



Bob got his B.A. from Middlebury College with a major in religion and a minor in renaissance history, thereby getting a good start on developing librarian-geek cred. His early jobs were service-related, first in a church-sponsored school, later in establishing a group home for teens in Berea, Kentucky. While in the latter job, Bob spent a lot of time in the Berea College Library studying for the GRE. It was there he was inspired to pursue a career in librarianship. His studies at the SUNY Albany School of Library and Information Science (MLS, 1984)

were focused toward medical librarianship and general science bibliography. But a shortage of medical library positions and the inexorable intertwining of library work with information technology drew him on to Syracuse University, where he studied information retrieval systems, office automation, and human-computer interactions, and received the Certificate of Advanced Studies in Information Transfer in 1988. On completion of his C.A.S., Bob had a choice between an academic position and a position with a subscription agency. He had experience through an internship at IBM with the systems used by the agency, so chose to go in that direction. "Luckily," he says, "I have been able to work with libraries ever since then."

For the next 15 years, Bob's work focused on the technology side of the vendor business, "... starting as a trainer for DOS based subscription control software for PCs, and gradually advancing to running MARC records services and then adding electronic data interchange services." He says he feels fortunate to have worked during this time under the guidance of Bonnie Postlethwaite (currently dean of libraries at the University of Missouri – Kansas City), and the late Fritz Schwartz, for whom NASIG named its prestigious library education scholarship. He continues, "I would have been content to pass my career on projects designed to eliminate manual data entry for everyone by implementing new data interchange services between library systems, intermediary systems, and publisher systems ...," but his professional trajectory changed when the agency he worked for went under.

Fortunately, Bob notes, a colleague pointed him toward the publisher formerly known as Kluwer Academic. "So," says Bob, "I finished with the agency on a Friday and started with the publishing firm the next Monday." When asked about making the transition from techie guy to licensing and library/vendor/agent relations guy, Bob responded:

As a former IT production person, I was not that keen on licensing. Balancing this was the fact that I was trained as a librarian and the clients were

academic libraries, so I reconciled myself to serving academic libraries in a new way. After the merger with Springer, it really worked out for me, as the larger firm looked at my experience at an agency and said they wanted me to write service level agreements with the agents and work with them regularly, and really professionalize the relationship.

Many librarians assume there are no more than a dozen agents of any consequence. I tracked over 400. I was privileged to travel to Australia, Thailand, Mexico, Europe, and the US, and count trips to 46 US states and 15 foreign countries so far. Many in publishing and with sales careers have traveled as much or more. We signed service agreements with over 50 agents that are still in place. Soon Springer realized that with the agent relations situation stabilized, I could take on relationships with other intermediaries like e-journal database providers and e-book platform providers. During this time, we shaped our licenses to create deals that would complement our direct sales using business models offered by others. I gave this work the name “network sales” because we were maintaining relationships with a network of intermediaries. But the norm in publishing is to keep things fresh by doing something new, so I was eventually asked to be a leader in a new area Springer was developing for marketing called account development. The intent of account development is to provide work to improve the discovery layer, and generally try to educate, train, and help with promotions at libraries. We are as close to sales as marketing gets, but I think we are rightly perceived as a service arm of a commercial company. For me, it is a chance to visit libraries again, work through the issues together, walk the beautiful campuses, and take pictures.

Reading over Bob’s resume, I was struck by how much work he’s done throughout his career in helping to develop information standards and best practices, including EDI, ONIX-PL, SERU, and PIE-J. When asked how he got involved in this kind of work, and what some of the rewards are, he responded:

Fritz Schwartz taught me to commit myself to understanding a new topic, often by signing up to present on that topic, and then to hurry to understand it because there was no choice! I agreed with Fritz that we would follow standards where they existed and create them where they were needed. I think it is fair to say that a very small

group of us in the library, agent, library systems, and publisher world took on EDI X12 and then EDIFACT, and now others have created ONIX and KBART, to simply try and automate as many of the infrastructural transactions as we could. But when I traverse the NISO web site I see so many other standards in so many other areas of library and information science, that I know it has taken thousands of people over the years to give us the control necessary to present an organized information resource to the user community. I have learned that some standards are elegant and comprehensive, but suffer from a critical mass of technical implementation by the various stakeholders. Perhaps it is best to say that it can take several efforts to hit upon a standard that is critical enough, and perhaps also simple enough to implement, that it takes off. Recently I have assisted on the Shared Electronic Resource Understanding (SERU) work because I have seen enough long tedious licenses and worked with enough libraries to know that, at least in the US, we are safe working from an understanding. The Presentation and Identification of e-journals (PIE-J) is really a call for common sense and bibliographic integrity. Platforms should present content as it was published. A page with content of a former title, with ISSN of the former title. A page with content for the current form of the title, together with ISSN for the current form of the title. Links back and forth between the two, and other conveniences. I think perhaps the greatest reward I ever got was hearing a librarian speak up at one ALA meeting to say that she was very grateful for electronic invoicing between her agent and her library system, because before it became available she had developed carpal tunnel syndrome in her wrists from typing agent invoices into her system, and now she could load the whole invoice with a few keystrokes in a few minutes.

Bob’s current job title at Springer is “Manager, Account Development and Strategic Alliances.” When he’s not at the Springer New York office, or on the road, you will find him working at his home office in Massachusetts, perhaps “aggregating usage statistics for the 250 large clients I track in my Northeast/Mid-Atlantic territory, sending welcome kits to clients who are new to a product or need updated information at renewal time, arranging events for libraries – often relating to improvements in the discovery layer, and conducting

discovery reviews for clients.” And what are discovery reviews? He explains, “Discovery reviews are a fairly new thing for us. We evaluate library search tools as well as associated tools like Google Scholar and Google Books, doing a variety of searches to check the robustness of access to our publications.” Other times, he travels to attend conferences or to make presentations. Sometimes, he says, he travels “to visit individual clients to discuss trends in how they are using our content and what we both want to do in the future.” He continues:

Sometimes we are lucky enough to participate in a library open house or vendor day. Interacting with faculty authors and future student authors is fantastic. We like to have a lot of fun with these events. Giveaways, music, food, and a lot of library promotion! There is the strong sense among publishers that it is no longer enough to sell a library a package of online content. It is important to back that library with as much support as possible to make that purchase a success. I think active marketing is the next major stage for academic libraries, an aspect of which is the trend that has librarians moving out into classes and project groups. This is the online world we now inhabit. It runs the danger of being invisible unless we take many steps to make it visible. My favorite project this year has been working with Deborah Lenares and Steve Smith at Wellesley College on an E-book Preferences survey. A survey or other research approach not only helps the library match resources to users by subject, feature, and function, it also raises awareness of information resources, and brings prestige to the library. Wellesley has done very good work implementing and promoting eBooks, and it shows in their usage results. Publishers should creatively support and sponsor library-centered research when possible. Look soon for a Springer white paper describing the results of this survey.

When asked what drew him to NASIG, Bob explained:

As a former subscription agent involved with technical matters and standards that involved publishers, library system vendors, and serials librarians, NASIG was a very natural place for me to present my early work. I liked the informal dress, the overall lack of commercial slant, and the substantive nature of the presentations I attended. NASIG is a national conference I anticipate with

pleasure, and will be a place I continue to go for my professional development. I have had many of my role models become my friends through NASIG, and they pointed me to take my turn at leadership. Someday I hope to point others in the same direction.

As noted above, Bob is a creative thinker and an idea guy. When asked what his vision is for NASIG, he responded:

I would like NASIG to be an organization that carries on the conversation about the transformation of scholarly publishing, driving us down the road to a sustainable future and a new kind of librarianship. I would like in the short term to show libraries and publishers where they have common ground, such as in efforts to improve the discovery layer. I would like to encourage publishers to engage fully with the library and information community, and to this end I am building on ties between organizations like NASIG and the Society for Scholarly Publishing to develop programs where we will share a common table. I see the work of many NASIG past presidents trending this way, and I want it to continue. Whatever divide that money causes is not as important as the health of scholarly communication in general.

Being an executive for an international publisher, hammering out information standards, and presiding over a professional organization makes for a pretty busy schedule. So what does our 2012/13 prez like to do in his down time? Bob says:

I enjoy reading collections of essays and watching soccer games, especially if my son James is playing. Visiting my daughters Laura and Libby in college is great fun. As indicated earlier, I am a campus architecture photographer, with the libraries of many NASIG members in my desktop background rotation. I also enjoy working out on the elliptical at the YMCA with music of the appropriate beat on my iPod Shuffle.

In closing, Bob notes, “A final thank you to Steve Shadle for my presidential cowboy hat from Nashville. The folks at the Nashville airport were pretty cool with it. The changeover in Philadelphia was a little more exciting. I must think of some way to pay this forward to Joyce [Tenney, 2012/13 vice president/president-elect].”

### 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 [kblythe@email.unc.edu](mailto:kblythe@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.]

Readers, please allow a couple of new members to NASIG to introduce themselves in this quarter's column:

**Katy DiVittorio** started April 2 as the Serials Acquisitions Specialist at the University of Colorado, Denver.

This is a new position at UCD. I previously worked in ILL at Lewis & Clark Law School in Portland, OR. While working at L&C I took every opportunity to help out in the serials department. It is an area I greatly enjoy and am thrilled to now be working full time. I am receiving my MLIS from San Jose State University in May 2012. I am happy to be joining NASIG and look forward to the networking opportunities the organization offers.

Katy may be reached at:

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And then there is **Karen Harmon**.

I am a Master of Library and Information Studies student at the University of Oklahoma and a serials technician at the Schusterman Library on the OU-Tulsa campus. As one of the 2012 John Riddick Student Grant recipients I greatly appreciate the

opportunity to attend my first NASIG Conference. As I reviewed the conference sessions I had fun choosing a tentative schedule from the wide variety of excellent choices available. I am reassured this conference is going to be a great experience by the friendliness of those who have been in contact with me.

This will be my first national conference experience and I look forward to discussions of the issues facing serials librarians today and being able to apply what I learn to my remaining classes and my work now and in the future. I believe this will be an enriching experience for someone who is looking forward to becoming a professional librarian.

Karen may be reached at:

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### 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 [kblythe@email.unc.edu](mailto:kblythe@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.]

To gear up for the fast-approaching fall semester, take a look at:

Anne E. McKee's "sidebar article," published in the book, [The Librarian's Guide to Negotiation](#), which, in turn, was co-authored by Beth Ashmore, Jill E. Grogg, and Jeff Weddle, the former two of whom have



presented at NASIG on the topic of negotiation in the past.

Anne E. McKee, M.L.S.  
Past-President, NASIG  
Program Officer for Resource Sharing  
Greater Western Library Alliance (GWLA)

In addition to:

Smita Joshipura and Betsy J. Redman, "Navigating a Collaborative ERMS Trail from Planning to Implementation at ASU Libraries," *Against the Grain* 24:1 (2012): 46.

And:

Valerie Ryder and Rebecca Leue. "Electronic Resource Management Systems: Today's Realities and Tomorrow's Dreams." *INFOcus*, May 2012. Available at [http://www.libraryworks.com/LW\\_White%20Papers/WP-ERM.pdf](http://www.libraryworks.com/LW_White%20Papers/WP-ERM.pdf)

### 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 [kblythe@email.unc.edu](mailto:kblythe@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.]

**Carole Bell** drops in with:

Just a note to let my NASIG friends know that I am retiring as of April 30, 2012. After getting my MSLS at Drexel in 1986 I made the rounds in serials and acquisitions jobs at Penn, Brown, Northwestern and University of Maryland. I came home to Philadelphia ten years ago to finish out my career at Temple University.

Throughout my career, I maintained my relationship with NASIG. I have so many fond memories of NASIG conferences. I became the Co-Chair of the Mentoring Program and my five years working on

this endeavor became one of my most valued professional experiences. During the early years I also chaired or served on various ALA discussion groups and committees.

I'm so grateful to have had the career I've had. Those of us who began in libraries in the 70's had the opportunity to run the gamut from typing catalog cards, to dealing with electronic resources. We were the first group of librarians to have to read, interpret and negotiate licenses. It was a whole new world. The time flew by and now we are in the 'Cloud.' I plan to spend my retirement years teaching and practicing the art of needlepoint.

I'm going to miss all of the friends I've made over the years. I hope to see some of you again when ALA is next in Philly. Or please feel free to be in touch and drop me a line if you come to town. I'm keeping my Temple email.

Best wishes, Carole, [crbell@temple.edu](mailto:crbell@temple.edu).

**Lisa Blackwell**, formerly the Serials/Reference Librarian at Nationwide Children's Hospital, has recently accepted a new position. In her own words:

On April 23 I will assume the title of Director, College Library Services for Chamberlain College of Nursing. This national position reports to the VP, Academic Affairs and is responsible for overseeing library services at the twelve Chamberlain campuses nationwide. This new position allows me to keep an office on the Columbus Chamberlain campus but will entail traveling frequently. I'm excited and hoping to enjoy creating this position since it is a brand new role in the Chamberlain leadership.

**Kelsey Brett** has a new job title, as well. She writes to let us know that:

I have recently begun working at the University of Houston Libraries as the Resource Discovery Systems Fellow. I will be learning the ropes of Systems Librarianship and working on projects with our discovery system, the ILS, and electronic resources. I graduated with an MSIS from the University of Texas School of Information in May 2011, and this is my first professional-level position in a library. This June, I will attend my first NASIG conference. I am very

excited to enter the world of academic libraries, and I am very enthusiastic about what the future holds.

Kelsey Brett  
Resources Discovery Systems Fellow  
University of Houston Libraries, University of Houston  
713-743-9759  
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**Jill Bright**, the Serials & Interlibrary Loan Administrator at the St. Louis College of Pharmacy writes to say that:

I was promoted from Serials Administrator to Serials Librarian. I found out just after getting back from Nashville, my first full NASIG conference. Even though I have an overflowing list of new ideas to dig into and implement from Nashville, I'm already excited to see everyone again next year in Buffalo.

**Anna Creech** is now the Interim Director of Bibliographic and Digital Services until someone may be found to work the position full-time.

**Vicki Stanton** writes:

I will be retiring from the University of North Florida Library on March 31, 2012. I spent thirty-five years at UNF, my only professional library job! I started out as the Serials Librarian, then became Head of Serials, and recently became Head of Digital Projects and Preservation. I look forward to traveling, visiting with family and friends, gardening, and doing all the artsy-crafty projects that I never found the time to initiate.

**Barbara Walker**, formerly Barbara McWilliams, also formerly the Manager, Library Relations and Sales for SPCNet (Scholarly Publishers' Collaborative Network), is now the Content Licensing and Sales Manager for FASEB (Federation of American Societies for Experimental Biology).

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## Serials & E-Resources News

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### Report on the 31st Annual Charleston Conference, "Issues in Book and Serial Acquisition" November 2-5, 2011

Reported by Sara Bahnmaier, Head, Electronic Acquisitions & Licensing, University of Michigan

The 2011 Charleston Conference's theme was "Something's Gotta Give!" and the keynotes and presentations aimed at projecting a future world of libraries, publishers and vendors racing to keep up with rapid changes in environment and organizations. The keynoters offered high level visions of the status quo and why it must change and the session presenters provided the nuts and bolts. One of the things a new attendee will notice is the variety of session formats: "Happy Hour" sessions, "Fast Tech Talks," Pecha'Kucha-like "Shotgun" sessions; poster sessions, Dine-arounds,

vendor showcases, juried product development forums, and "Lively Lunches." One can try to follow the "threads" to focus on subjects most dear to one's heart, or sample the entire smorgasbord and expand one's borders a bit.

In plenary sessions, on the first day we learned about the semantic web (Michael Keller, Stanford); data papers in the network era (MacKenzie Smith, MIT); hidden collections (Mark Dimunation, LoC); the Digital Public Library of America by the director and board of DLF; (Robert Darnton, Rachel Frick, Sandy Thatcher); new initiatives in open research (Cliff Lynch, CNI and Lee Dirks, Microsoft). By the end, we were hearing finally why the "Status Quo Has Got to Go!" (Brad Eden, Valparaiso University).

The meeting rooms for the plenary sessions were filled to overflowing, so remote meeting spaces were necessary, which somewhat hampered audience feedback and reactions, however, the keynotes inspired much debate and comment as the audience left the rooms and dispersed into the next sessions, so the visionary spirit was evident throughout.

The Charleston Conference is always a great place to find out about new product development, new technology and applications, making it much easier to keep up to date on collection development and acquisitions. There were product “showdowns,” fast tech talks and innovation sessions presented by publishers and vendors and librarians. One could focus on new tricks to teach an ILS; going to the “cloud;” how services and collections are being tailored to the patrons’ needs now and in the foreseen future. The atmosphere was relaxed and informal; attendees were offered many opportunities to meet one’s contacts and colleagues face-to-face. It is clear to everyone in the library world today that we all benefit from a flow of information to help us make important decisions about licensing, acquisition, services, and of course, costs.

One of the best advantages of the Charleston Conference is the chance to customize the program that interests YOU, because all organizations are not alike and a one-fits-all approach does not work well. However, those who have gone to CC many times do see drawbacks to much larger size and complexity it has developed into; the conference organizers try to retain the personal and familiar feel that linked participants together, while coping with more than 450 persons instead of the small number that founded the CC in 1980.

#### *The Charleston Advisor*

<<http://www.charlestonco.com/index.php>>, *Against the Grain* – both the publication and the website <<http://www.against-the-grain.com/>> – and the MultiGrain discussion forum <<http://www.against-the-grain.com/2011/11/multigrain-discussion-whats-going-on-in-the-penguin-overdrive-amazon-affair/>> are an additional plus for those of us who need our “fix”

between Charleston Conferences. I, for one, can’t wait to see what amazing discoveries we’ll make at the next Conference!

### **Report on Electronic Resources & Libraries 2012 Conference, Austin, Texas**

Kate Moore, Indiana University Southeast

This year’s [Electronic Resources & Libraries](#) (ER&L) conference was held April 2<sup>nd</sup> through April 4<sup>th</sup> at the AT&T Conference Center in Austin, Texas, with an opening reception on the evening of April 1<sup>st</sup> in the University of Texas-Austin Library. This was the first year that ER&L also had an online conference, in which numerous sessions were available streaming live as well as recorded for those who registered.

In addition to the conference itself, three four-hour workshops were held; one the day before the conference and two in the afternoon of April 4<sup>th</sup>. Designed to provide more in-depth information than possible to cover in the regular session times allotted, the three workshops focused on usability testing in digital libraries, negotiation with vendors and internal constituents, and a crash course in licensing for those new to the field.

Keynote presentations started off the day on Monday and Tuesday, and the conference closed with a panel discussion on library leadership. Monday’s keynote was presented by Andrea Resmini who discussed cross-channel experiences in the context of the library. He noted that librarians need to re-examine and rethink how we use our physical (circulation desk, reference desk, etc.) and digital (website, mobile site, Facebook, etc.) channels of communication, and ensure that all of our channels of communication are appealing and inviting to our users. Resmini’s session can be viewed from the ER&L website:

<http://www.electroniclibrarian.com/erl-keynote-speakers-live-session>. Tuesday’s keynote was presented by Peter Jaszi and Brandon Butler. They discussed ARL’s new “Code of Best Practices in Fair Use for Academic and Research Libraries” and provided guidance on how to use the document to address local

issues with copyright and fair use. The closing keynote panel discussion focused on inspiring leadership wherever you are in your career.

In addition to the keynote presentations and session offered, attendees also had the opportunity to participate in lightning talks on Monday after lunch, as well as an informal discussion group on the new TERMS (Techniques for ER Management) project on Tuesday. More information about the TERMS project is available here: <http://6terms.tumblr.com/>

There were over forty sessions offered this year, broken into ten tracks:

- Collection Development
- eBooks
- Emerging/Future Technologies
- eResource Delivery & Promotion
- ERM
- Managing Electronic Resources
- Scholarly Communication
- Standards
- Statistics Assessment
- Workflows & Organizations

Summaries of some of the sessions I attended are below. Anna Creech, who writes the blog, [Eclectic Librarian](#), has also posted summaries of the sessions that she attended during the conference.

### **All you can ERMS: Laying out the Buffet of eResource Management Systems**

This two-session question and answer panel presentation was facilitated by Jill Emery, and participants in the panel were librarians who implemented and currently use a wide variety of different electronic resource management systems (ERMS), including the free and open source CORAL created by the University of Notre Dame, Ex Libris' Verde, Innovative Interfaces' Millennium III ERM, OCLC's WorldShare License Manager, and Serials Solutions' 360 Resource Manager. The length of time that participants had been using their ERMS ranged from several months to over five years. The questions to the participants focused on three areas: the "appetizer" (implementation), "entrée" (current practice), and "dessert" (future directions).

The reasons participants gave for choosing a particular ERMS ranged from the desire for the tool to integrate with other library systems, including their ILS, to the modularity of the product. One librarian who had implemented an ERMS in 2005 noted the lack of choice then in comparison to now. When asked the number of staff using ERMS on a regular basis, most librarians noted that there were definite differences between those who used the ERMS daily (generally one to two users) and those who used it monthly (many more staff). When asked if implementation was considered successful at their libraries, most noted that while there had been problems, they were fairly satisfied with the result. Several librarians noted that entering the licensing data and other information was what took the most time, and that an ERMS is always a work in progress.

The "entrée" section of the session focused on current ERMS workflow. Some libraries started with workflow they had created prior to implementation of an ERMS, but noticed that as the ERMS matured, it began driving workflows in acquisitions. One librarian found that working out best practices for the library before implementing the ERMS was important and helped to identify new workflows. When asked what was considered essential for ERMS, respondents named a variety of features including reports, tracking and alert systems, ILL functionality, usage statistics, and the web-based source of contact information. Some underutilized tools mentioned by participants included note fields, usage statistics, and the ability to show licensing terms to users. Panelists noted some problems with the ability for their ERMS to integrate with other products, including SUSHI services and tracking the different naming systems for the same database in different vendor products.

The "dessert" portion of the session focused on future directions for ERMS. The most discussed and requested direction from librarians on the panel was the need for more seamless integration of all services, including the ERMS. The session concluded with vendors of the products discussing future directions for their products,

and a short question and answer period with the audience.

### **Coming to a Desk near You: The Millennials!**

This panel discussion began with a review of the three major generations within the library workplace: the Baby Boomers (born after WWI), the Generation X-ers (born in the mid-1960s-late 1970s), and the Millennials (born in the early 1980s-2000s) and the perceived differences between them, including their career values and rewards. These generational differences were then discussed in three areas of managing electronic resources: workflows, technology, and leadership.

In terms of workflows, it was noted that everyone has some shared values as well as unique talents, and regardless of generational gaps, leaders within the library should recognize individual differences, make accommodations when necessary, and ensure that everyone is effectively doing their job. It was noted that Millennials who are being hired are looking for acceptance of who they are, respectfulness of theirs and other's differences, and want coworkers to be interested in and excited about what they do.

All generations have grown up with advancing technologies; however, the Millennials have grown up during a period in which the rate of change in technology has increased dramatically. The presenters noted that even though the Millennial generation has grown up with rapidly changing technology, they are not necessarily more adept at using it than other generations.

In terms of leadership, as the Baby Boomers begin to retire, it becomes necessary for the Generation X-ers and the Millennials to work together and step into leadership roles within the library. The Millennials seem more interested in collaborative workspaces, and look to leaders or mentors that are not necessarily older, but may be their peers or librarians who they feel they can relate to. One of the panelists, Nancy Beals, noted that a restructuring of her library which moved to emphasize collaboration has worked well not just for Millennials, but for other generations as well.

Discussion during the session also brought up dealing with generational differences with library staff that were born before the Baby Boomers and how best to ensure that all generations within your staff are interacting together positively and working towards a shared goal.

### **Discovery Services: Reconciling the Idealist and the Pragmatist**

This discussion session had audience members thinking and talking about discovery services as they relate to two very different perspectives: the idealist and pragmatist. Using the book *College Libraries and Student Culture: What We Now Know*, Eric Frierson began the discussion first with the differences between the idealist (who believes that students are motivated by the love of learning, with research being filled with discovery and contemplation) and the pragmatist (who believes that students are in higher education to train for the workforce, and research just needs to satisfy the current information need). Frierson argued that with the implementation of discovery services, libraries may be better meeting the pragmatist's needs, but are selling the idealist short. However, he and audience members noted that the skills of the idealist are still incredibly important for users, including evaluating the resources retrieved, differentiating between disciplines, and knowing how information within each discipline is organized. In order to satisfy the pragmatist and the idealist, discovery services and the librarians who use, tweak, and teach these services need to keep both types of users in mind when reviewing tools for implementation and use in the library.

### **The Biggest Winner: An "Urgent, Social, Blissful and Epic" Competition to Promote Underused Databases"**

In this session, Amy Fry shared her experience with using a "Biggest Loser" style competition amongst librarians at her university to promote underused databases to students, faculty and staff. Fry drew parallels to this competition from [Jane McGonigal's TED talk](#) in which she noted that gaming can create a better world by fostering urgent optimism, encouraging social

interactivity, encouraging blissful productivity, and creating a desire for epic meaning.

A total of twelve librarians at her university participated in the competition, and the database that showed the highest percent of increased usage from the same period the previous year would be considered the winner. Strategies that librarians used to promote databases included links on the library's front page and LibGuides, instruction sessions and workshops focusing on their database, signage around campus and handouts, and promoting use at the reference desk.

Some of the databases in the competition did see a large percentage increase in use. Unfortunately, overall there was a 6% decrease from last year's usage of the databases in the competition (other databases not in the competition saw a 10% decrease). This was, however, blamed on the implementation of Summon, which does not search within any database. With the inclusion of full-text retrievals and sessions, databases that provided full text content to Summon and were in the competition saw a similar increase in usage than those not in the project but also available in Summon. Databases in the project but not available through Summon saw a much larger increase in use than databases not in the project and also not in Summon.

During her presentation, Fry noted what worked well during the competition, including working with the faculty to promote the database, showing students databases at the reference desk, and teaching the database during instruction sessions.

Some of the reasons why, despite promoting the databases, increased usage was not seen were: some databases had barriers to use (including additional logins); there was one database that changed titles during the competition; there were some technical difficulties with another database; and students are still more likely to use the open web than a library resource for research. She notes, however that the project was fun and built collegial working relationships among librarians, and three of the databases in the competition are still showing stronger use.

Fry offered advice for other librarians who may be interested in starting this at their library: begin planning early and start with a smaller number of databases. She found that having twelve databases in the competition was too many, and there wasn't time to fully implement some of the promotional ideas she had had in mind. She also suggested encouraging teaching faculty members to consider entering in the competition.

### **Collecting Undergraduate Research: Challenges and Opportunities**

During this session, three faculty members from UCLA discussed the opportunities and challenges in collecting undergraduate research. They observed that undergraduate research was previously a part of the hidden scholarly record, and that libraries need to start viewing these students not just as learners, but also as researchers. They documented some of the programs undertaken at UCLA to collect undergraduate research, including a capstone initiative that promotes and encourages undergraduate research. This has been particularly successful in the sciences.

Efforts in the library to foster undergraduate research have focused on a four-year service model, starting with the library as the academic service hub, where students can learn research and study skills, experiment with digital learning technologies, and engage with cultural heritage materials. Other components include promoting the library as a showcase for research and as a venue for student performances. A final component is promoting the library as the publisher of undergraduate research.

The discussion then moved to the challenges of collecting undergraduate research, including faculty anxiety about making students' research publicly available, problems with copyright and intellectual property, the often irregularity of student publications, and the capacity or lack of a digital repository on campus. The session concluded with audience members sharing the challenges and opportunities presented on their own campuses, as well as advice on strategies for increasing or starting the collection of undergraduate research.

## Report on Electronic Resources & Libraries 2012 Conference, Austin, Texas

Virginia Bacon, East Carolina University

The 2012 Electronic Resources & Libraries Conference was held April 2-4 in Austin, Texas. ER&L, which began only a few years ago in 2006, brings together a diverse group of information professionals to discuss the many issues surrounding managing electronic resources. Big themes at this year's conference included e-books, particularly PDA and DDA programs, statistics and assessment, scholarly communications, and electronic resource management. Below I describe a few of my favorite sessions of the more than 50 offered over the three days of the conference.

The conference began with a keynote presentation by Andrea Resmini, an information architect and user experience designer from Sweden. Andrea's talk centered around the idea that the virtual world is not separate from the physical world, but instead is "tightly integrated into the world around us." Users want to be able to find information and accomplish tasks through multiple channels, and they want to be able to start in one channel, such as the physical stacks, and end the task through another channel, such as through the library website on a mobile phone. These types of experiences are called "cross channel" experiences. As librarians we need to think about how we can integrate all of the different channels that our patrons use to access library services and resources so that they can move between these channels easily and seamlessly. Some key concepts to remember about cross channel experiences:

1. Information architectures are becoming ecosystems— No artifact stands alone; instead they are all interrelated and connected.
2. Users become intermediaries—Users are becoming more and more involved with content creation.
3. Content and user interfaces will never be "finished"—they will continue to change constantly (this seemed to me to be particularly relevant to electronic resources – titles change publishers, aggregators add and drop titles seemingly at random, interfaces are updated all the time).

4. Dynamic becomes hybrid—Boundaries between different artifacts are becoming fuzzy and thin; interfaces need to integrate information coming from different sources.
5. Horizontal prevails over vertical—More informal structures of categorization, such as tags, will take over more rigid hierarchies of categorization, such as cataloging rules.
6. Products become experiences—We shouldn't design an experience with only that experience in mind; it is necessarily linked to many other experiences that we must take into account with our design.
7. Experiences become cross channel experiences—Cross channel experiences will be ubiquitous.

The advent of cross channel experiences seems is a big future challenge for people designing the experience of the library. We have put a lot of focus on the library as a physical space as well as a virtual space, but have not put a lot of effort into connecting the two. On the virtual side, electronic resources are particularly difficult to pull together seamlessly because of the number of publishers, vendors, platforms, etc., as well as all of our silos for managing them, such as discovery layers, catalogs, ERMS, digital collections, and institutional repositories. How do we bring all of these different pieces together into one seamless experience? That is quite the challenge.

### Designing a Copyright Outreach Program for Your Campus

This session was presented by Angela Riggio and Diane Gurman, two librarians from UCLA who work in the library's Scholarly Communications and Licensing unit. While many libraries are not large enough to have their own department devoted to scholarly communications and licensing, the presenters gave some good tips for how to get started with designing a program suitable for other institutions. They emphasized starting small and letting a program grow over time, as well as to make sure that whatever you do is in line with the mission and goals of your institution. They also recommended finding other parts of campus that could be interested in partnering with you to educate about these issues, for example the Graduate School, or

student groups. The primary audiences for this sort of education and outreach seem to be faculty and graduate students, mostly because they are involved in publishing, though undergraduate students could probably benefit from instruction on the basics of copyright and plagiarism. The presenters found that word of mouth was probably their best marketing tool, and suggested that programs still in their infancy should concentrate on offering incentives to get attendance to their sessions and grow the program. Finally, they emphasized the importance of getting outside of the library physically – going to speak to people in other departments and areas of the school rather than expecting them to come to you.

### **Collaborative Marketing for Electronic Resources**

In this session, Marie R. Kennedy from Loyola Marymount University described a study she undertook to determine if certain marketing techniques for electronic resources are actually effective. While there is a lot of literature detailing different ways that libraries can and do market different kinds of resources and services, there is not much data supporting many of these practices. Kennedy recruited dozens of libraries to participate in a study that attempted to benchmark a single marketing technique – in this case e-mailing e-resource tutorials to library staff to see if the tutorials increased the staff's understanding of the resource (in the hopes that these staff would then be more likely to promote the resource, but that was not evaluated in this study). All of the participating libraries went through the same process of developing marketing plans and collaborated on a wiki to ask each other questions and share ideas. After the plan was developed, they all sent out e-mails to library staff that encouraged staff to complete a tutorial for a particular electronic resource. A reminder e-mail was sent out a few weeks later, and then was followed up with a brief survey. Each library chose its own resource to promote and wrote their own e-mails, but all followed the same timeline.

Unfortunately due to a high drop-out rate, not many conclusions could be reached from this study, but the data does suggest that sending out tutorials in e-mails

can be a good way to familiarize library staff with an electronic resource. Kennedy also wanted to do a more sophisticated analysis of what type of e-mails and tutorials were more effective, but again there was not enough data. Overall this was an interesting presentation, and I'd love to participate in a future study of this nature in order to help the profession create strong best practices for e-resource marketing. This topic is going to become increasingly important as more and more of our collections and services move online.

### **Trials by Juries: Suggested Practices for Database Trials**

Three librarians (one each from Golden Gate University, University of Nebraska – Kearney, and Clemson University) discussed how each of their institutions dealt with setting up and gathering feedback for database and other resource trials. Their workflows were all pretty similar and seemed to be in line with standard practice of most libraries for these kinds of trials. A couple of interesting ideas did, however, emerge. One librarian uses a blog to post and gather feedback for database trials in the comments. Some of the librarians used spreadsheets to track both trial requests (to help remember if they have been requested before), as well as trial results. Some also push out several e-mail reminders to pertinent people to increase the amount of feedback for a particular trial. I also liked the suggestion of offering small incentives in order to get feedback; this can be done at public service desks or via e-mail. All three presenters initially stated that it was better not to advertise trials very widely for fear that a library user who found the resource useful would be disappointed to discover that the trial database they used once was no longer available. However, someone questioned this during the Q&A period the presenters seemed to have reconsidered their initial position, admitting that they actually could see how promoting trials more widely might be useful to get more feedback on them.



## **The Biggest Winner: “An Urgent, Social, Blissful, and Epic” Competition to Promote Underused Databases.**

My favorite session from the conference was probably The Biggest Winner: “An Urgent, Social, Blissful, and Epic” Competition to Promote Underused Databases. The presenter, Amy Fry, from Bowling Green State University in Ohio, discussed a competition that she organized between librarians to promote underused databases. The driving idea was that using competitions and games is a great motivator to get people to do things, so instead of just asking librarians to promote databases, Fry made it fun by turning database promotion into a game. Each librarian or group of librarians in the competition selected a database from a list of underused databases created by Fry and then had an entire semester to try to increase use of that database compared to the previous fall semester. Whoever had the largest percentage increase of use for their database at the end of the semester won the competition and received a \$100 gift card that Fry provided (incentives are always helpful to encourage participation) as well as the knowledge that they may have saved their database from the budgetary chopping block. While some people actually saw their database usage fall overall (possibly because of Summon being implemented during that same semester), the competition revealed some of the more effective strategies for database promotion. These effective strategies include pushing the database with subject area faculty, promoting the database at services points and giving people a small incentive (e.g. candy) to try it out on their own, and teaching the database in bibliographic instruction sessions. Fry considered the project a success and wants to repeat the competition in the future.



## **Report on the 21<sup>st</sup> North Carolina Serials Conference, “Déjà vu All Over Again: Familiar Problems, New Solutions” Chapel Hill, NC, March 16, 2012**

Dianne Ford, Elon University

Dean Irene Owens, from the School of Library and Information Sciences at North Carolina Central University (NCCU), welcomed serialists, publishers, and vendors to the 21<sup>st</sup> North Carolina Serials Conference. The theme this year was exploring new and more complex solutions to ongoing challenges in the serials world.

Kristin Antelman, Associate Director for the Digital Library at North Carolina State University (NCSU), offered the morning keynote: “Serials in the Wild: How Do We Think about What We’re Seeing?” The keynote ranged the full landscape of current issues in the transition to e-serials, including what libraries care about and what users care about, data quality issues, poor change management in title and publisher changes, open repository data, and willingness to publish in open access format. In the end, it comes full circle to providing access for our users. Useful resources mentioned include [GOKb](#), [Kuali](#) open source software, and [Dryad](#) repository for bioscience data.

Morning concurrent sessions included “Serials Staffing Challenges from the Paraprofessional Perspective”, “Bundles, Big Deals and the Copyright Wars: What Academic Librarians Can Learn from the Record Industry Crash”, and “Built to Suit: A Database Designed to Efficiently Collect Usage Statistics Came with a Bonus”. In the third session, Jane Bethel, from University of North Carolina (UNC) Chapel Hill and EPA libraries, described EPA’s use of SILS interns to assist in building an Access database (rather than Excel software) to track usage statistics. The query features in Access have allowed for ease in generation of many required reports.

The morning concluded with a panel discussion on the topic “Responding to Change: Creative Approaches to Current Serials Challenges.” Denise Branch, from

Virginia Commonwealth University, discussed her library's solution for problems of e-serials access, including building an electronic problem report form and the library archive for problems, responses, and users. Sarah Brett, from James Madison University (JMU), described streamlining processes for a tech support form for reported issues, building staff as expert first responders, and running a log to track stats. Cheri Duncan, also from JMU, shared about their library giving staff iPads and allowing telecommuting two days/month to increase efficiency. Duncan also shared how JMU libraries are adapting to new structures for bibliographic services and e-resources and serials. She recommends ACRL's report "[Changing Roles of Academic and Research Libraries](#)". Patricia Hudson, Senior Marketing Manager for Oxford University Press, discussed the increasingly blurry line between journals and e-books, the idea of an "issue" becoming a historical concept, Oxford's experimenting with open access models (~ 90 titles), evaluating what is "circulation" and "usage", e-journals looking more like databases, and Oxford Handbooks transitioning to updating articles – now a serial? The free "[Oxford Index](#)" allows users to search across all Oxford electronic academic content; soon offering the ability to limit results to subscribed content.

Time was allocated for meeting with vendors before a sumptuous buffet lunch.

Afternoon breakout sessions included a repeat of the serials staffing program, plus "Weeding Déjà Vu: New Solutions for How to Dispose of Withdrawn Materials Responsibly" and "The (All Too Familiar!) Journal Cancellation Review: Proven Techniques for Eliciting

Quality Feedback". In the third session, Christie Degener and Susan Swogger with the UNC-Chapel Hill Health Sciences Library walked us through their library's 3-year plan for summer journal cancellation review. NCSU library provided a good working [model](#) for this process; UNC Health Sciences focused on engaging their diverse user communities in the design of the review process and encouraging their useful feedback. A feedback database collected responses about affiliation and journal rating (must keep, keep if possible, don't keep, comments). Publicity was vigorous through liaisons, letters to deans, and a button on the library website.

The afternoon wrapped up with a keynote by Kevin Guthrie, President of Ithaka, called, "Will Books Be Different?" Guthrie compared the many differences between journals and books in their transition from print to electronic, and the challenges ahead for libraries, publishers, societies, authors, and readers. Models will need to be different for different types of books – reference, trade, scholarly, textbooks – and the transition to electronic will be different for these various formats. Many questions remain unresolved: licensing for individual access vs. institutional access, consortial purchasing, big deals, what is usage, preservation, reading devices, and discovery. Stay tuned!

Attendance was excellent at this content-rich conference; scheduling will be at a similar time next year. Please consider participating!



# Executive Board Minutes

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## April Conference Call

Date: April 30, 2012

### Attendees:

#### Executive Board:

Steve Shadle, President  
Katy Ginanni, Past-President  
Bob Boissy, Vice President/President-Elect  
Carol Ann Borchert, Secretary  
Lisa Blackwell, Treasurer  
Jennifer Arnold, Treasurer-Elect

#### Members at-Large:

Patrick Carr  
Clint Chamberlain  
Stephen Clark  
Buddy Pennington  
Jenni Wilson  
Allyson Zellner

#### Ex officio:

Angela Dresselhaus

### 1.0 Welcome (Shadle)

Shadle called the meeting to order at 3:05 PM EDT.

### 2.0 Secretary's Report (Borchert)

#### 2.1 Outstanding Action Items

The action items were reviewed and updated as follows:

#### Not Done/In Progress:

**ACTION ITEM:** Blackwell will follow up and make sure that rates on the Membership Benefits page are listed in U.S. dollars and that it includes the separate rate for Mexican members. **IN PROCESS**

**ACTION ITEM:** Blackwell will ask the Website Liaison to work with ArcStone on getting organizational dues added to the invoice form.

**ACTION ITEM:** Blackwell will ask the Website Liaison to follow up with ArcStone regarding the issue of members not being able to submit more than one nomination form when they were logged in.

**ACTION ITEM:** Blackwell will ask the Website Liaison to obtain a list of current customers using the new ArcStone platform.

**ACTION ITEM:** Blackwell will ask the Website Liaison to work ArcStone to schedule a demonstration for NASIG regarding the new functionality.

**ACTION ITEM:** Blackwell will discuss investment scenarios with our investment banker.

**ACTION ITEM:** Boissy will ask MDC to print copies of an updated membership flyer and have copies sent to Borchert. **IN PROCESS**

**ACTION ITEM:** Borchert, Pennington, and Dresselhaus will draft a version of the contingency planning document for the membership in bullet list form. **IN PROCESS**

**ACTION ITEM:** Borchert, Pennington, and Dresselhaus will discuss contingency planning documentation and forward any documents to the Board that might be appropriate for making public on the strategic planning page.

**ACTION ITEM:** Borchert will ask the Photo Historian to work with the Archivist to find out options regarding archiving and organizing photos on UIUC's site.

**ACTION ITEM:** Carr, Arnold, Shadle, and Ginanni will work on providing mutual access to manuals for CPC, PPC, PPR, and the Past President. **IN PROCESS**

**ACTION ITEM:** Chamberlain will ask E&A to poll vendors via email to see how NASIG could be more valuable to them/how the conference could be a more valuable experience. This should include sponsorship, the vendor expo, or other forms of participation. **IN PROCESS**

**ACTION ITEM:** Chamberlain will email the draft of competencies to the Board for feedback.

**ACTION ITEM:** Clark will ask CEC to put out a call for volunteers to help set up webinars over the next year and to work with this year's PPC to get names and proposals. **IN PROCESS**

**ACTION ITEM:** Clark will ask CEC to work with PPC to identify content and use survey results to identify potential locations and organizers. **IN PROCESS**

**ACTION ITEM:** Clark will ask CEC to work with PPC to create something such as a podcast and/or website that explains the conference program proposal process. **IN PROCESS**

**ACTION ITEM:** Ginanni will investigate obtaining an Outsell report to see if there is an environmental scan already done.

**ACTION ITEM:** Ginanni will contact Oscar Saavedra regarding the possibility of setting up a continuing education event in Mexico. **IN PROCESS**

**ACTION ITEM:** Pennington will ask someone from ECC to write a *NASIG Newsletter* article explaining the different NASIG communication and social media options.

**ACTION ITEM:** Pennington and Clark will talk to ECC & CEC about working together on the Archiving Information section of the CEC-PPR proposal. **IN PROCESS**

**ACTION ITEM:** Pennington will ask ECC and the Website Liaison to explore where we could add advertisements into the NASIG website without ArcStone intervention. **IN PROCESS / ON HOLD UNTIL UPGRADE?**

**ACTION ITEM:** Shadle will put together a group (Blackwell, Arnold, ECC folks, Pennington, Beth Ashmore, possibly Boissy) to identify new ArcStone features and cost thereof and will make a recommendation to Board whether to upgrade or not, or to search for a different company.

**ACTION ITEM:** Shadle will move forward with appointing a Mission/Vision Task Force. **IN PROCESS**

**ACTION ITEM:** Shadle will forward T&F LIS and NASIG copyright forms to the Board for discussion.

**ACTION ITEM:** Shadle will work with Stacy Stanislaw on the Taylor & Francis contract.

**ACTION ITEM:** Shadle will contact UKSG regarding reformatting of Serials e-News and organizational membership.

**ACTION ITEM:** Wilson will forward an editable version of current membership brochure to Borchert.

#### Completed Items:

- Borchert will ask the Archivist to make sure the 2000 and 2003 Strategic Plans and 2007 Action Plan are in the archives.
- Clark will ask CEC to investigate online learning tools for webinars. Asking other library organizations already using this might be a good place to start.
- Ginanni will discuss complimentary copies of the Proceedings with Taylor & Francis, since questions arise about this issue each year about how many we have to distribute.

## 2.2 Approval of Board Activity Report

Shadle made a motion to approve the Board Activity Report, seconded by Clark. All members voted in favor.

1/12 The Board agreed that if two preconference presenters wanted to share a room, NASIG would cover 4 nights instead of the normal two. The cost works out to be the same.

1/12 The Board agreed that the NASIG Forums could be removed now that NASIG-L is available for use again, and that they did not need to be archived.

1/12 The Board agreed to a drawing for early registrants again for the 2012 conference.

1/12 In response to a question about eligibility for the Fritz Schwartz award, the Board opted to allow a new student to apply, given that the application is extensive and that the student could not re-apply once they had earned more than 12 credit hours.

1/12 The Board and Archivist agreed that a .pdf copy of the Proceedings for the archives would be very helpful. The Board President will request this in the renewal for the Taylor & Francis contract.

1/12 The Board provided input on a survey to level membership dues for international members.

1/12 The Board agreed to set pricing for guests to attend the Country Music Hall of Fame event at \$90.

1/12 N&E forwarded the nominations slate to the Board for informational purposes. The Board was impressed with another great slate of NASIG nominees!

1/12 Board members provided input on the draft version of the Core Competencies for Electronic Resources Librarians. The Task Force should be releasing a draft to the membership prior to the conference in June.

1/12 The Board discussed and agreed on cutoff dates and rates for conference registration. Members will pay \$375 through May 4, and \$425 from May 5-25. Paraprofessionals will again receive a discounted rate of \$250 through May 4, but will pay \$425 May 5-25. Nonmember and on-site registration will be \$500.

2/12 **VOTE:** Arnold made a motion to do a \$100 cash drawing for early registrants, seconded by Borchert. Ten members voted in favor, with two abstaining.

2/12 The Board approved the 2012 NASIG Conference flyer for distribution.

2/12 The Board enthusiastically approved the recommendation of Sara Bahnmaier as the incoming *Proceedings* editor for 2012/2013.

2/12 The Board approved the registration announcement to be sent out via email.

2/12 The Board agreed to add the Conference Coordinator in Training to the Executive Board listserv.

2/12 **VOTE:** Ginanni made a motion to sponsor the North Carolina Serials Conference for \$1,000, seconded by Shadle. Nine members voted in favor, with 3 abstaining.

2/12 The Board provided feedback on ECC's proposal to use Slideshare for conference presentation materials, ultimately agreeing that the presentation materials could be open access.

3/12 **VOTE:** Ginanni made a motion to have NASIG webinar recordings free for registrants when possible, seconded by Chamberlain. Ten members voted in favor, with two abstaining.

3/12 **VOTE:** Executive Board members voted on pricing for NASIG webinars via SurveyMonkey. Eleven members voted in favor of \$35 for members, with one

vote against. Seven members voted in favor of \$50 for non-members and \$95 for groups, with 5 votes against.

3/12 Board members discussed ECC's suggested use of Slideshare for presentations and encouraged ECC to work with PPC and CPC with the goal of using it for the 2012 conference.

3/12 The Board agreed to set up a separate presenter rate for the 2013 conference, which will be ½ of the full member conference rate.

3/12 Now that the discussion forums are gone, the Board agreed to ECC's suggestion to use NASIG-L for people to arrange dine-arounds, roommates, etc. for the conference. ECC will temporarily add any non-member registrants to NASIG-L once a week until registration closes.

3/12 **VOTE:** Ginanni made a motion to approve the slate of award winners from A&R, seconded by Clark. All members voted in favor.

4/12 The Board discussed the issue of whether to continue giving recognition gifts to all outgoing committee chairs and Board members and decided that A&R could offer the option of a recognition gift or an equivalent donation made to NASIG on their behalf with a recognition certificate.

4/12 The Board provided feedback on the new Student Outreach Committee brochure.

4/12 **VOTE:** Borchert made a motion to sponsor the Mississippi State University E-Resource Summit for \$1000, seconded by Ginanni. Nine members voted in favor with 3 abstaining.

4/12 The Board agreed that there should be one page for conference sponsors and a separate one for exhibitors in the vendor expo.

4/12 The Board encouraged CEC to move forward with their first webinar, Effective Negotiation in the 21st Century: From Computer-Mediated Communication to Playing Hardball.

4/12 The Board agreed with ECC's suggestion to remove the Catalog links page under Resources and replace it with a page for the NASIG webinars. Upcoming webinars will also be listed on the Events page.

### **3.0 Treasurer's Report (Blackwell)**

NASIG total assets are at \$532,525.87, which is nearly \$100,000 ahead of this time last year.

#### **3.1 Keeping Outgoing Treasurer on Accounts**

One reason for the idea of keeping the outgoing Treasurer on the Chase bank accounts is to keep someone on the account who knows how to work the procedures, and the incoming Treasurer is not near a Chase branch. It was decided that it is not necessary to keep the outgoing Treasurer as a signatory on the Chase account, since the Vice-President/President-Elect, President, and Past President are also signatories on the account. Further, the ease of online banking, email and telephone all make it unnecessary for the Treasurer to be in the same town as a Chase branch. The Board appreciates all that Blackwell has accomplished in transitioning our accounts from Bank of America to Chase.

### **4.0 Committee Updates (All)**

*Archivist*—Paula Sullenger will be Archivist in Training for 2012/2013.

*Awards & Recognition*—no report

*Bylaws*—no report

*Conference Planning*—Everything is going well in terms of planning. They have a question about printing costs, because it looks like they will go over budget this year on printing.

*Conference Proceedings*—2011 Conference Proceedings are published and we have a new *Conference Proceedings* editor.

*Contingency Planning Document TF*—This is on the agenda later in the call.

*Continuing Education*—Webinar planning is moving along. The Board is fine with making recordings free after a period of time (perhaps six months) for members.

**ACTION ITEM:** Shadle will contact Pamela Bluh regarding webinar cancellation policies.

*Core Competencies TF*—Task Force is removing references to print serials management per the Board's suggestions and is working on the conference presentation. It was suggested to get the document out to the membership before the conference.

*Database & Directory*—They expanded the chairs list so that other members can help out more.

*Electronic Communications*—They will be using SlideShare for the 2012 conference presentations. Also, the webinar page is up on the NASIG website.

*Evaluation & Assessment*—Working on the survey for the conference evaluation.

*Financial Development*—no report

*Membership Development*—We need to find the most current version of the flyer and make sure that information is up on the website. Rather than printing it, MDC suggests that we put it online so that people

can print it out as needed, rather than printing a bunch of copies at once.

*Mentoring Group*—The Board Liaison will check to see if they are getting enough mentors signing up.

*Newsletter*—The *NASIG Newsletter* is a bit behind but should be caught up within two weeks.

*Nominations & Elections*—There are limitations to the software for submitting nominations where members could not submit more than one nomination form while they were logged into the NASIG website.

*Program Planning*—Planning is moving along. There is going to be a lot of turnover next year on this committee.

*Publications & Public Relations*— PPR has managed to work out the conference announcement process so that it is flowing more smoothly this year. The Board discussed whether the *UKSG eNews* should be distributed by the Publicist (rather than by the Vice President/President-Elect), but no decision was made.

*Site Selection*—Conversations have started regarding a site for the 2015 conference.

*Student Outreach*—no report

#### **5.0 A&R Awards—Need for Board Approval? (Wilson)**

**VOTE:** Shadle made a motion for the Board to approve the final slate of award winners, seconded by Boissy.

A&R does not currently have a committee manual. Many of the items that the Board discussed this year should be contained in a committee manual for A&R.

**ACTION ITEM:** Wilson will ask A&R to create a committee manual to codify some of the issues that arose this year.

## 6.0 Contingency Planning TF Guidance (Borchert)

There was only one response to the first document sent out from the Contingency Planning Task Force via NASIG-L, and nothing from LinkedIn, Facebook, or Twitter. The Board will discuss via email how to proceed from here with membership input on the contingency planning topics.

## 7.0 NASIG Sponsorship Process (Shadle)

There has been some confusion this year on how things move forward once the Board approves funding for an event. This process needs to be streamlined to avoid miscommunication problems. The Board discussed whether we should budget an amount for sponsoring conference events and work from there or if that might hamper us from being able to provide seed money for new events. We might need to change the process that sponsors go through, since we currently ask them to fill out our form before receiving a check. This conversation will be continued via email.

## 8.0 FDC Investigating/Managing Investment Options (Blackwell)

This item was moved to the June Board meeting agenda due to time constraints.

The meeting adjourned at 4:17 PM Eastern.

Minutes submitted by:  
Carol Ann Borchert  
Secretary, NASIG Executive Board  
May 3, 2012  
Revised May 21, 2012

## June 2012 Meeting

**Date:** June 6, 2012

**Place:** Sheraton Music City Hotel (Cheekwood Room),  
Nashville, TN

### Attendees

Executive Board:

Steve Shadle, President

Katy Ginanni, Past-President

Bob Boissy, Vice President/President-Elect

Carol Ann Borchert, Secretary

Lisa Blackwell, Treasurer

Jennifer Arnold, Treasurer-Elect

Members-at-Large:

Patrick Carr

Clint Chamberlain

Buddy Pennington

Jenni Wilson

Allyson Zellner

Ex officio:

Angela Dresselhaus

Guests:

Joyce Tenney, incoming Vice President/President-Elect

Shana McDanold, incoming Secretary

Chris Brady, incoming Member-at-Large

Tim Hagan, incoming Member-at-Large

Selden Lamoureux, incoming Member-at-Large

Michael Hanson and Karen Davidson, PPC co-chairs

Ann Ercelawn and Beverly Geckle, CPC co-chairs

Anne McKee, Conference Coordinator in Training

Regrets:

Stephen Clark

## 1.0 Welcome (Shadle)

Shadle called the meeting to order at 8:36 a.m.



## 2.0 CPC (Arnold, Ercelawn, Geckle)

CPC welcomes everyone to Nashville and thanks Joyce Tenney for all of her help and guidance in planning the conference.

Ercelawn reviewed logistics for the Country Music Hall of Fame event on Friday night. We are having a full dinner rather than appetizers, with an Italian food theme.

The Holiday Inn and Sheraton have shuttles available to go between hotels, but the primary purpose of the shuttles is to transport to and from the airport. People with cars are asked to help transport those without vehicles. Taxi service from the Sheraton is slow. CPC will have handouts at the registration desk for road closures during the festival.

Opening reception will also be a Latin-themed dinner. The cost to make Thursday and Friday full dinners was fairly low.

## 3.0 PPC (Carr, Hanson, Davidson)

Things are running smoothly, and audiovisual setups seem to be in order. The structure of the program changed a lot this year, so it will be interesting to see what feedback we receive on the evaluations. If possible, we'd like to add a question on the evaluations specifically for feedback on the program changes this year.

Continuing Education appreciated PPC sharing program information with them on possible programs for webinars.

SlideShare changed the configuration options a few days ago, so PPC and ECC have scrambled to adjust to the current configuration for uploading presentation slides. Presenters can upload slides to their personal account now and share with NASIG rather than having an event section. The event section that no longer

exists was not linkable to our main NASIG page. ECC will evaluate if we want to continue to use SlideShare for future conferences or if they wish to explore other options. There is no guarantee of any archiving via SlideShare. There should be a policy statement indicating this is a temporary space for presentation materials.

**ACTION ITEM:** Zellner and Clark will ask CPC and ECC to add policy statement to speakers' page indicating the SlideShare page is temporary space and the conference proceedings is the official archive of the conference.

**ACTION ITEM:** McDanold will ask the Archivist to investigate whether UIUC can take presentation slides into the archive and in what file formats.

The Board appreciates all of PPC's and CPC's great work in getting the conference together!

## 4.0 Site Selection (Boissy, McKee)

The Board discussed site options for the 2015 conference.

## 5.0 System Needs (Shadle)

There was a suggestion about registration software for the conferences. We could use RegOnline (<http://www.regonline.com>), which allows us to drill down in creating a registration form. It costs \$3.55 per registrant, and it allows us to run reports for planning food and other events. We need to investigate whether there is an option to upload member information so that we know who is a member registrant versus non-member. Each person can print off their own agenda once they've registered. We can test this on a webinar before we try this with a full conference.

This brings up the issue that we need to review all of our system needs and what system will serve us best. What are the functions that we need in the various activities that we do (conference planning, program

planning, member registration, proceedings publication, elections, listserv management, archiving, etc.)? We are on a year by year contract with ArcStone.

**ACTION ITEM:** All Board Liaisons will consult with current and former committee chairs to make a “needs and wants” list in terms of computer system needs and functionality within and outside of ArcStone.

**ACTION ITEM:** Tenney will forward information from the American Society of Association Executives web site, which contains information for nonprofit association conference planning regarding systems we might want to use for our functions.

**ACTION ITEM:** Shadle will draft a memo to go to committees for them to report to the Board regarding system needs.

**ACTION ITEM:** Boissy will assemble a task force to examine system needs across the organization.

**VOTE:** Shadle made a motion for the Treasurer and the Registrar to investigate and set up a trial with RegOnline for the next webinar and possibly the 2013 conference, seconded by Ginanni. All voted in favor.

**ACTION ITEM:** Arnold will work with the registrar to investigate the possibility of using RegOnline and set up a trial for the next webinar.

## 6.0 Secretary’s Report (Borchert)

### 6.1 Approval of April 30 minutes

Shadle made a motion to approve the April 30 conference call minutes, seconded by Boissy. All voted in favor.

## 6.2 Action Item Updates

The list of Board action items was updated as follows:

### Not Done/In Progress:

**ACTION ITEM:** Blackwell will follow up and make sure that rates on the Membership Benefits page are listed in U.S. dollars and that it includes the separate rate for Mexican members. **IN PROCESS**

**ACTION ITEM:** Boissy will ask MDC to print copies of an updated membership flyer and have copies sent to McDanold. **IN PROCESS**

**ACTION ITEM:** Carr, Arnold, Shadle, and Ginanni will work on providing mutual access to manuals for CPC, PPC, PPR, and the Past President. **IN PROCESS**

**ACTION ITEM:** Clark will ask CEC to put out a call for volunteers to help set up webinars over the next year and to work with this year’s PPC to get names and proposals. **IN PROCESS**

**ACTION ITEM:** Clark will ask CEC to work with PPC to identify content and use survey results to potential locations and organizers. **IN PROCESS**

**ACTION ITEM:** Clark will ask CEC to work with PPC to create something such as a podcast and/or website that explains the conference program proposal process. **IN PROCESS**

**ACTION ITEM:** Ginanni will contact Oscar Saavedra regarding the possibility of setting up an online continuing education event in Mexico. Clark will follow up. **IN PROCESS**

**ACTION ITEM:** Hagan will ask ECC to work with ArcStone on getting organizational dues added to the invoice form.

**ACTION ITEM:** Hagan will ask ECC to follow up with ArcStone regarding the issue of members not being able to submit more than one nomination form when they were logged in.

**ACTION ITEM:** Hagan and Clark will talk to ECC & CEC about working together on the Archiving Information section of the CEC-PPR proposal. **IN PROCESS**

**ACTION ITEM:** Hagan will ask ECC to explore where we could add advertisements into the NASIG website without ArcStone intervention, and pass that information to FDC. **IN PROCESS /ON HOLD UNTIL UPGRADE?**

**ACTION ITEM:** McKee will approach appropriate organizations with the idea of a national summit.

**ACTION ITEM:** Shadle will move forward with appointing a Mission/Vision Task Force. **IN PROCESS**

**ACTION ITEM:** Shadle will contact Pamela Bluh regarding webinar cancellation policies.

**ACTION ITEM:** Shadle/Ginanni will ask E&A to poll vendors via email to see how NASIG could be more valuable to them/how the conference could be a more valuable experience. This should include sponsorship, the vendor expo, or other forms of participation. **IN PROCESS**

#### Completed:

- Blackwell will discuss investment scenarios with our investment banker.
- Borchert will ask the Photo Historian to work with the Archivist to find out options regarding archiving and organizing photos on UIUC's site.
- Chamberlain will email the draft of competencies to the Board for feedback.
- Pennington will ask someone from ECC to write a *NASIG Newsletter* article explaining the different NASIG communication and social media options.

- Shadle will forward T&F LIS and NASIG copyright forms to Board for discussion.
- Shadle will work with Stacy Stanislaw on the Taylor & Francis contract.
- Shadle will contact UKSG regarding reformatting of Serials e-News and organizational membership.
- Wilson will forward an editable version of current membership brochure to Borchert.
- Wilson will ask A&R to create a committee manual to codify some of the issues that arose this year.

#### Removed/Replaced:

- Blackwell will ask the Website Liaison to obtain a list of current customers using the new ArcStone platform.
- Blackwell will ask the Website Liaison to work with ArcStone to schedule a demonstration for NASIG regarding the new functionality.
- Borchert, Pennington, and Dresselhaus will draft a version of the contingency planning document for the membership in bullet list form.
- Borchert, Pennington, and Dresselhaus will discuss contingency planning documentation and forward any documents to Board that might be appropriate for making public on strategic planning page.
- Ginanni will investigate obtaining an Outsell report to see if there is an environmental scan already done.
- Shadle will put together a group (Blackwell, Arnold, ECC folks, Pennington, Beth Ashmore, possibly Boissy) to examine new ArcStone features and cost thereof will be to make a recommendation to Board whether to upgrade or not, or to search for a different company.
- **Action Item: Shadle will approach ER&L with the idea of a national summit.**

### **6.3 Approval of Board Activity Report**

Shadle made a motion to approve the following Board activity report for addition to the minutes, seconded by Wilson. All voted in favor.

4/12 The Board reviewed the PowerPoint of NASIG sponsors from CPC and made suggestions.

4/12 The Board agreed that it is fine for ALPSP to distribute their event announcements on NASIG-L, since they will be doing the same for us on their membership distribution list. The Board will discuss a workflow at the June meeting for how distribution will happen.

5/12 The Board discussed the second draft of the membership flyer and made suggestions.

5/12 The Board discussed whether to allow tier 1 sponsors to use member email addresses one time, and decided against changing what we offer sponsors mid-stream. The Board will discuss further at the June Board meeting.

5/12 The Board discussed what printed items to continue to include in conference packets and decided to keep: the business meeting agenda, the list of Board members for the coming year, and the 2012 award winners. The call for nominations and committee rosters will be removed.

5/12 The Board agreed to spend an additional dollar per attendee at the Country Music Hall of Fame event to provide a full dinner rather than appetizers.

5/12 The Board discussed the *Conference Proceedings* contract with Taylor & Francis and the renewal timeframes. The Board decided to renew for three years.

5/12 UKSG offered NASIG a reduction in the price we are paying for distribution of UKSG e-News to NASIG members. The Board heartily concurred with the reduced price.

5/12 The Board decided against offering a reduced price for purchasing the archive of a webinar. If attendees are not able to view the webinar live, they will be able to view it later.

5/12 CEC members should be attending the first NASIG webinar at no charge, since they will need to

provide feedback for future webinars. The Board would like a written evaluation of this event.

5/12 The Board would like for CEC and E&A to work together on a survey for attendees to evaluate the webinar.

5/12 The Board agreed with the proposed closing date for online registration of May 25.

5/12 The Board provided feedback on the Taylor & Francis contract renewal to publish the *NASIG Conference Proceedings*.

5/12 The Past President announced that 2012 sponsorships to date total \$39,250.00. NASIG currently has five organizational members. The Board appreciates all of Ginanni's work to obtain sponsorships for the 2012 NASIG Conference!

5/12 NASIG's first webinar attracted 54 total registrations, with 21 of those being group registrations. Congratulations to CEC and our presenters for organizing such a successful webinar!

## **7.0 Website Liaison (Blackwell)**

Several action items pertained to the website liaison position. It was suggested that the responsibilities of this position be rolled back into ECC rather than being a separate position. It makes sense for the people managing the website to talk directly to ArcStone without a liaison.

**VOTE:** Shadle made a motion to eliminate the website Liaison position and incorporate into ECC, seconded by Blackwell. All voted in favor.

## **8.0 Treasurer's Report (Blackwell)**

We still brought in a healthy amount of sponsorship money in spite of this being a difficult financial year.

Blackwell spoke with the investment banker, and May was the worst month in 3 years for investments. Our investments are moderately conservative, so we are still doing pretty well.

Total assets currently sit at \$542,997.99, which is nearly \$40,000 ahead of where we were last year. Thanks to Ginanni's great work, sponsorships and organizational membership dues currently sit at \$45,250. Because the secretary is now printing and mailing conference flyers, there was discussion of which budget line should include this expense. Currently this is under the Treasurer's budget, and can remain so. Website Liaison line item can be removed, as that money has not been used the past two years.

### **9.0 Consent Agenda**

Awards & Recognition  
Archivist/Photo Historian  
Bylaws  
Conference Proceedings  
Database & Directory  
Financial Development  
Membership Development  
Nominations & Elections  
Publications & Public Relations  
Student Outreach

**VOTE:** Boissy made a motion to approve the committee reports on the consent agenda as submitted, seconded by Zellner. All voted in favor.

### **10.0 Publicist Distribution of Non-NASIG Content (ALPSP) (Shadle)**

The Publicist is already handling NASIG communication outside of NASIG, so distribution of communications from ALPSP to the NASIG membership would add a separate responsibility for them. It would make more sense for the Vice President/President-Elect to handle this communication as they do for the UKSG Serials e-News. We don't expect this to be a frequent activity.

**ACTION ITEM:** Shadle will ask ALPSP to add Vice President/President-Elect as contact for distribution of their materials.

### **11.0 Distribution of Conference Registrant Email Addresses to Conference Sponsors (Shadle)**

The Board discussed whether to allow Tier 1 sponsors to have email addresses in addition to snail mail addresses. There have been problems with people being added to email lists from other conferences and not being able to unsubscribe when emails were being sent through a third party. The idea of allowing email addresses for Tier 1 arose when at least one vendor chose a lower level of sponsorship because they wanted email not snail mail addresses. An alternative would be for Tier 1 vendors to send email through ECC as a blast to conference attendees. One of the Board members developed language to send to Tier 1 sponsors allowing for a single mass mailing using attendee email addresses:

We have added e-mail addresses to your registrant list this year, with the proviso that these addresses can only be used for one mass mailing to the registrants, and may not be outsourced to any 3rd party marketing service. You may pass a mass mailing to our Electronic Communication Committee if you wish, and it will be distributed on your behalf.

### **12.0 FDC Investigating/Managing Investment Options (Blackwell)**

It might be wise to differentiate the responsibility between the person handling the mechanics of working with investments and the person(s) making decisions about where to invest money. The challenge will be to find committee members for FDC with the financial savvy to make investment decisions, though this has been a challenge for the Treasurer as well. The current treasurer has been working with an investment banker, who makes recommendations but not decisions for us, particularly in terms of level of investment risk.

Another option would be to have a Development Officer.

**ACTION ITEM:** Ginanni will draft a job description for a Development Officer position and send to the Board for review.

### **13.0 Contingency Planning Task Force (Borchert)**

#### **13.1 Document(s) to Put on Strategic Planning Page**

#### **13.2 Next steps**

The Contingency Planning session took place two years ago, so adding information to the strategic planning web page is going to be a bit historical. Given that the Board has taken several actions resulting from the contingency planning process, the task force can create a document with a brief narrative about why we did contingency planning and the changes that have resulted from that.

Action Item: Borchert, Pennington, and Dresselhaus will create a document outlining the reasons for the contingency planning session in 2010, and the actions that have resulted from that session.

### **14.0 ECC Questions & Recommendations (Pennington)**

#### **14.1 Conference Handouts**

The Archivist does collect conference handouts for the NASIG archives, whether they are included on a public website or not. PPC should add to their manual to make sure handouts go to the Archives, and that the presenters give permission to allow NASIG to make their presentations available on our website.

**ACTION ITEM:** Carr will ask PPC to add to their manual that handouts go to the Archives, and that the presenters give permission to allow NASIG to make their presentations available on our website.

### **14.2 Tweet Collection/Archiving**

There has not been a lot of Twitter activity at this conference compared to other conferences. The Board decided not to archive this information. After the conference, the context for the Tweets is gone. ECC had additionally suggested moving Forms under About NASIG and renaming Resources as Continuing Education, since that is where we tucked the information about the recent webinar. Continuing Education won't fit in that location as a label, but Education might be another option. The Board would like more information from ECC for that entire section and how best to present it.

**ACTION ITEM:** Hagan will ask ECC to make recommendations for the entire Resources section in terms of what to call it and what to include there.

### **15.0 Disbursement of *Proceedings* Editor Stipends (Shadle)**

Under the new contract with Taylor & Francis, the Conference Proceedings editors receive a conference stipend. Taylor & Francis will give the \$1,000 stipend per editor to NASIG, and the editors will fill out a reimbursement form for conference expenses. NASIG will reimburse the editors for up to \$1,000 per editor. This information should be added to the conference compensation web page. If the institution is paying full expenses for the editors, NASIG will keep the stipend.

**ACTION ITEM:** Boissy will draft text for the conference compensation web page to account for the editors' stipend.

### **16.0 PPC Wiki Idea (Carr)**

PPC suggested creating wikis for the conference manuals rather than static .pdf files. This might make it easier to share information among committees since there are a few committees that need to share such information, such as CPC, PPC, PPR and the Past

President. The ECC wiki from pbwiki is publicly available, and there is no way to require registration for access. In particular, the CPC manual should not be available publicly. A wiki model would be easier to update as committees went along. Certain portions of the manuals can be freely shared among committees, but other sections should be for the committee only. This can be incorporated into the larger discussion of needed web services and functionality.

## **17.0 Follow-up from Webinar (Clark)**

### **17.1 Free Distribution of Webinar Recordings**

ALCTS makes webinar information freely available after 6 months. We have not, to date, made any agreements with the presenters for whether to offer their content freely online, but could do so from this point forward. Live attendance allows for questions and feedback, but the recording loses that dynamic. We also need to be aware that we might repeat a topic over time.

**ACTION ITEM:** Clark will give information to Board regarding any agreement with presenters, particularly in terms of possibly making their content available online for free. He will ask CEC to work with PPC to develop such an agreement for future webinars.

### **17.2 Feedback from Attendees**

CEC provided the summary evaluation results to the Board, and a few Board members attended the webinars. Connectivity was good with the exception of one or two attendees. The Board discussed details of the evaluations, which were overall very positive.

Registration income was \$3805, but we don't have a final figure yet for profit from the webinar. We need to investigate if it would be cheaper to do a flat rate for the webinar software.

## **17.3 Improvements for Next Time**

We could create tips for doing a good webinar presentation for future presenters. ALCTS provides a good starting point. Presenting a webinar is very different from presenting in person with the lack of visual cues, and handling questions in a virtual environment.

**ACTION ITEM:** Clark will ask CEC to look at ALCTS website, WebEx's help site, and any other useful sources to create a tip sheet for webinar presenters.

All webinars should be branded with the NASIG logo. CEC could provide a template to presenters for them to use.

**ACTION ITEM:** Clark will ask CEC to create a template with the NASIG logo for webinar presenters.

## **18.0 Other Items (All)**

One Board member requested clarification regarding having slides publicly available. 2011 slides and earlier are not publicly available; 2012 slides to date are. However, we need to add something into the speaker agreement to let them know that their materials will be publicly available. That statement is under speaker resources, but not necessarily in the signed speaker agreement. We also need to consider who has liability if a speaker has copyrighted material in their slides without obtaining permission to do so. If NASIG retains copyright for the slides, NASIG would be liable.

**ACTION ITEMS:** Carr will ask PPC to create a form for speakers to sign outlining expectations and responsibilities pertaining to conference handouts, obtaining copyright permissions, written record for the proceedings, and the presentation itself.

The topic arose regarding having a mobile site for the conference program information. One Board member noted it was really helpful at another conference to

have that feature available. Boopsie was one option that was discussed, as was Google Calendar.

Minutes submitted by:  
 Carol Ann Borchert  
 Secretary, NASIG Executive Board  
 June 13, 2012

The meeting adjourned at 4:23 p.m.

## Treasurer's Reports

Lisa S. Blackwell, NASIG Treasurer

### April 30, 2012 Report

4/30/2012		
Account	Interest rate	
<b>ASSETS</b>		
JP Morgan Investments (Cash value and Liquid Assets)	~1.85%YTD	\$98,400.00
Business Checking	0.01%	\$13,361.67
Business High Yield Savings	0.20%	\$420,764.20
<b>TOTAL Cash and Investments</b>		<b>\$532,525.87</b>
<b>LIABILITIES</b>		
		\$0.00
<b>TOTAL ASSETS &amp; LIABILITIES</b>		<b>\$532,525.87</b>

### Retrospective year comparison

4/25/2011		
Account	Interest rate	
<b>ASSETS</b>		
JP Morgan Investments		\$53,074.62
Business Checking	0.01%	\$63,246.92
Business High Yield Savings	0.20%	\$341,457.93
<b>TOTAL Cash and Investments</b>		<b>\$457,779.47</b>
<b>LIABILITIES</b>		
		\$0.00
<b>TOTAL ASSETS &amp; LIABILITIES</b>		<b>\$457.779.47</b>



## June 6, 2012 Report

NASIG finances are healthy and represent fiscal prudence. Investments have been increased and, despite the stock market fall in value during May full recovery is predicted by our financial investments advisor at CHASE due to moderately conservative investment policy. We project modest revenue from the 2012 conference.

### Balance Sheet (Fiscal Year 2012 to Date)

6/6/2012		
Account	Interest rate	
<b>ASSETS</b>		
JPMorgan Investments (Cash value and Liquid Assets)	~1.85%YTD	\$92,095.53
Business Checking	0.01%	\$30,316.18
Business High Yield Savings	0.20%	\$420,586.28
TOTAL Cash and Investments		\$542,997.99
<b>LIABILITIES</b>		
		\$0.00
<b>TOTAL ASSETS &amp; LIABILITIES</b>		<b>\$542,997.99</b>

Thanks to the persistent efforts of past president Katy Ginanni there are once again an amazing number of sponsorships for the 2012 conference. With 26 organizational sponsors, 4 organizational members and a final total of \$45,250.00 we can take pride in the support that industry entities have given NASIG despite the economic realities of the past year.

### 2012 Organizational Sponsorships & Organizational Members

AIP		\$1,000.00
Alexander Street Press		\$1,000.00
Allen Press		\$1,750.00
American Medical Assn		\$1,000.00
Annual Reviews		\$500.00
BioMed Central		\$1,000.00
Brill		\$1,000.00
Duke University Press		\$1,000.00
EBSCO	HORIZON SPONSOR	\$2,000.00
Elsevier		\$2,000.00
Emerald		\$1,000.00
Harrasowitz		\$1,000.00
IEEE		\$1,000.00
Ingram/Coutts		\$2,000.00
Innovative		\$1,000.00
IOP		\$2,000.00
JSTOR		\$1,000.00

Nature	BREAKS SPONSOR	\$3,000.00
OCLC		\$1,000.00
Oxford University Press		\$2,000.00
Project Muse		\$3,000.00
SAGE		\$1,000.00
Serials Solutions		\$1,000.00
Springer		\$3,000.00
Wiley		\$2,000.00
WT Cox		\$2,000.00
	ORGANIZATIONAL MEMBERS	
De Gruyter		\$1,500.00
Informa		\$1,500.00
Rockefeller		\$1,500.00
Swets		\$1,500.00
		<b>\$45,250.00</b>

2012 Committee Expenditures (January-December Budget)

<b>NASIG committees</b>	<b>2012 budgeted</b>	<b>2012 to date</b>
Administration	\$20,000.00	\$8,999.52
Archives	\$405.00	\$0
A&R	\$20,685.00	\$11,892.05
Bylaws	\$50.00	\$0
CEC	\$7,500.00	\$6,110.24
CPC	\$1,530.00	\$572.09
D&D	\$535.00	\$0
ECC	\$12,979.00	\$8,911.50
Evaluation	\$100.00	\$0
Financial Dev (FDC)	\$200.00	\$0
MDC	\$520.00	\$0
Newsletter	\$60.00	\$0
N&E	\$200.00	\$149.54
Proceedings	\$30.00	\$0
Pub PR	\$150.00	? (must recheck records)
PPC	\$2,650.00	\$1,578.20
School Outreach	\$50.00	\$0
Site Selection	\$1,000.00	\$0
Treasurer	\$12,220.00	\$7,595.10
Web liaison	\$525.00	?
<b>TOTAL</b>	<b>\$81,389.00</b>	<b>\$45,808.24</b>

## 2011/2012 Committee Annual Reports

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### Archivist & Photo Historian

Submitted by: Peter Whiting and Deberah England

#### Members

Peter Whiting, archivist (University of Southern Indiana)

Deberah England, photo historian (Wright State University)

Carol Ann Borchett, board liaison (University of South Florida)

#### Continuing Activities

- Continue the ongoing collection of NASIG material.
- Continue to review web photo hosting and sharing sites.

#### Completed Activities

Here is the response from Melissa Salrin, University of Illinois, on submitting material electronically.

We are currently expanding our capabilities to ingest electronic records here at Illinois; we have created an electronic records repository workflow that will allow us to easily transition to a formal trusted digital repository named Medusa (an implementation of Fedora and Hydra tools) that is currently under development at the U of I. At present, when electronic records exist, they are linked to the control card for the record series. Some materials are available for immediate download (online) and others are only available near-line. For an example, please see the following record series:

<http://www.library.illinois.edu/archives/archon/index.php?p=collections/controlcard&id=10857&q=stan+smith>

Just as with analog records, it is important to contact us in advance of sending us any materials so that we can be sure that all records submitted are of

enduring value. Also, if we know the file formats and file sizes, we can then better assess the optimal method of transfer (e.g., DVDs, flash drives, portable hard drives). I am attaching a records transfer form that addresses both analog and digital submissions. Please note that this form is for ALA records; we have not yet created a template for non-ALA records, but the key information requested (file formats, size, etc.) is still the same.

While we will of course commit to preserving and maintaining electronic records with enduring value, the way in which we provide access to such materials will necessarily evolve over time (e.g., some items, for privacy or other reasons, may be only available near-line and by request). Also, a lot is dependent on the size and frequency of accessions, both from NASIG and other units. Please note that Melissa Salrin is no longer at the University of Illinois.

This was shared with the NASIG Board, and they agreed that the Archivist should pursue submitting material electronically.

Selected photographs posted by members to the NASIG Flickr site of the 2011 St. Louis Conference were retrieved and archived.

Created NASIG Photo Archive Policy and NASIG Photo Historian Conference photograph list.

Attended two digital preservation webinars. Of the two one was focused on preserving digital photographs. Of note, the experts advised maintaining a digital archive of photographs in two different locations. For this reason, the NASIG Photo Historian would like to advise retaining the Yahoo Groups site as a second backup with a primary site still to be determined.

## Budget

No expenses to report.

Submitted on: April 27, 2012 & May 14, 2012



## Awards & Recognition Committee

Submitted by: Jessica Ireland

### Members

Jessica Ireland, chair (Radford University)  
Sandy Folsom, vice-chair (Central Michigan University)  
Leigh Ann DePope, member (Salisbury University)  
René Erlandson, member (University of Nebraska, Omaha)  
Mary Greci, member (University of Oregon)  
Yumin Jiang, member (University of Colorado Law Library)  
Lisa Kurt, member (University of Nevada, Reno)  
Betty Landesman, member (National Institutes of Health)  
Jennifer Sippel, Mexican Student Award Coordinator (Minneapolis Community & Technical College Library)  
Beth Weston, member (Bethesda, MD)  
Dana Whitmire, member (UT Health Science Center at San Antonio)  
Jenni Wilson, board liaison (Alexander Street Press)

## Continuing Activities

- A&R is currently in the process of ordering plaques and awards from Brandon's Awards in Knoxville.
- The booking of travel and making accommodation arrangements for the award winners attending the conference in Nashville is nearly complete.
- AMBAC is in the process of selecting a Mexican Student Grant winner.

## Completed Activities

The 2012 slate of NASIG award winners is complete with the exception of the Mexican Student Grant. The NASIG-selected awards were selected by the committee in February and March.

## Budget

The A&R committee is in the midst of its budgetary cycle, as most of its annual outlays occur immediately before and after the annual conference. As of May 2012, it appears that our projected expenses are in line with the budget request for 2012, with a few exceptions:

- The actual expenses for Brandon's and postage/shipping will be lower than expected, since outgoing committee chairs and Board members have been given the option of making a donation to NASIG in lieu of receiving an item of recognition.
- Many of the flights for award winners were booked on Southwest, which offers two free checked bags, so the expenses for travel airfare + baggage should be lower than initially expected.

## Statistical Information

A&R received the following number of applications for the 2012 awards cycle:

- 9 applicants for the John Riddick Student Grant (3 awards granted)
- 4 applicants for the Fritz Schwartz Scholarship (1 scholarship granted)
- 4 applicants for the Horizon Award (1 award granted)

- 8 applicants for the Serials Specialist Award (2 awards granted)
- 2 applicants for the Rose Robischon Scholarship (1 scholarship granted)
- 1 applicant for the John Merriman Joint NASIG/UKSG Award (1 award granted)
- 2 applicants for the Marcia Tuttle International Grant (1 grant awarded)
- Mexican Student Grant : selection managed by AMBAC

Submitted on: May 1, 2012

### Bylaws Committee

Submitted by: Carol Ficken

#### Members

Carol Ficken, chair (University of Akron)  
 Elizabeth McDonald, vice-chair (University of Memphis)  
 Leigh Ann DePope, member (Salisbury University)  
 Deberah England, member (Wright State University)  
 Linda Pitts, member (University of Washington)  
 Sharon Scott, member (University of California, Riverside)  
 Susan Wishnetsky, member (Northwestern University, Feinberg School of Medicine)

#### Continuing Activities

None

#### Completed Activities

Please accept this annual report of the Bylaws Committee for 2011/2012. Our only meeting was at the NASIG annual conference at St. Louis, Missouri.

As requested we added two words to the Bylaws to reflect payment of dues by organization members which was previously voted upon and accepted.

This was a very inactive year for the Bylaws Committee.

#### Budget

None requested

Submitted on: April 17, 2012

### Conference Planning Committee

Submitted by: Ann Ercelawn, Beverly Geckle, Co-chairs

#### Members

Ann Ercelawn, co-chair (Vanderbilt University)  
 Beverly Geckle, co-chair (Middle Tennessee State University)  
 Deborah Broadwater, member (Vanderbilt University)  
 Jennifer Clarke, member (Bucknell University)  
 Kay Johnson, member (Radford University)  
 Shana McDanold, member (University of Pennsylvania)  
 Sarah Perlmutter, member (EBSCO Information Services)  
 Jennifer Sauer, member (Fort Hays State University)  
 Danielle Williams, member (University of Evansville)  
 Kevin Furniss, Registrar (Tulane)  
 Michael Arthur, Registrar in Training (University of Central Florida)  
 Jennifer Arnold, board liaison (Central Piedmont Community College)  
 Joyce Tenney, consultant (University of Maryland, Baltimore County)

The Nashville CPC got off to an early start in planning due to dates coinciding with Country Music Fest and Bonnaroo. Logistics for this conference were a bit different given our location at an airport hotel, the Sheraton Music City, with overflow going to a second hotel (Holiday Inn) a mile away.

Our first task (after the creation of the theme and logo) was to choose a venue for our special night out. With the permission of the Board, we signed a contract in October with the Country Music Hall of Fame® and Museum, one of Nashville's premier attractions, but

somewhat costly due to separate ticket charges in addition to food and venue costs.

Throughout the planning process, Beverly took the lead in choosing menus at the hotel, managing the budget, and producing all the signage, while Ann worked on arrangements at the Museum and with the Sheraton Music City on VIP reservations and meeting rooms. The co-chairs managed the website with the exception of program information handled by PPC, and Ann contributed publicity. Danielle Williams and Jennifer Sauer worked on restaurant recommendations for conference attendees since the conference provided all meals with the exception of a free night on Saturday. Sarah Perlmutter coordinated the vendor expo (which involved 28 vendors) and open mic night at the hotel on Saturday night. Deborah Broadwater worked with the Nashville Convention Center on providing local information and assisted with setting up local tours. Kay Johnson investigated discounts for car rentals and rooms for discussion groups. Jen Clarke ordered folders and ribbons for award winners and set up the Café Press site. Shana McDanold worked with our AV vendor, The Productions Solution Group, an outside company that provided excellent service, and negotiated special power requests with the hotel. Kevin Furniss served as registrar for the conference and Michael Arthur, registrar in training, coordinated volunteers who assisted on site.

Special thanks also to our conference consultant, Joyce Tenney, and our Board liaison, Jennifer Arnold, for their guidance and expertise throughout the planning process.

### **Budget**

The committee had approximately \$1000 in expenses. Expenses consisted of the cost of supplies, travel to meetings and the committee dinner on the eve of the conference.

The final conference financials are not yet available. The conference budget projected total expenses of \$150,197 with total income of \$170,134 creating a potential profit of nearly \$20,000. The largest expenses came from food: \$89,985 at the hotel and \$22,869 at the special event venue. The total cost of the special event was \$34,430.74. AV services cost \$16,768. The income amount included \$39,250 raised in conference sponsorship from 26 vendors. Exact revenue from registrations is not final at this time.

### **Recommendations to Board**

Refine the registration process. It was difficult to get precise numbers to turn in for the Country Music Hall of Fame event.

Some budget projections were challenging due to a lack of detailed registration numbers with corresponding registration rates, numbers for hotel waivers and speaker expenses. Perhaps some standardization in reporting this information for budgeting could be explored. Clarification on which expenses are conference, committee or administrative would also be useful.

Consider appointing a higher percentage of locally based committee members, if circumstances permit.

Consider investigating another vendor for souvenirs that can provide higher quality products at better prices than Café Press.

Reducing the necessary components of the conference packet would assist in lowering printing costs and time in preparing the packets. Including vendor literature in the packet was time consuming and it was difficult to identify packet materials shipped with other vendor materials in spite of separate labeling. Set aside a table at registration for attendees to pick up relevant vendor materials instead.

Submitted on: July 16, 2012

## Conference Proceedings Editors

Submitted by: Wm. Joseph Thomas, Sharon Dias-Correia, and Sara Bahnmaier

### Members

Wm. Joseph Thomas, editor (East Carolina University)

Sharon Dias-Correia, editor (University of Toronto)

Sara Bahnmaier, incoming editor (University of Michigan)

Allyson Zellner, board liaison (EBSCO)

### Continuing Activities

- Recorders for the 2012 Conference:
  - The editors sent out a call for recorders for the 2012 conference in mid-March via the blast messaging system, the NASIG blog, and the “What’s New” area on the NASIG website. (Twitter/Facebook/other?)
  - Applications were due in mid-April and are being reviewed by the editors.
  - Recorders will be contacted in early May with their assignments and information on paper requirements.
  - Presenters who will be writing up their own sessions were contacted in late April with information on paper requirements.
- Editors will continue to work closely with the Board Liaison and the Program Planning Committee on papers whose presenters intend to submit for publication. (There is one such paper identified for the 2012 Conference.)

### Completed Activities

The 2011 *Proceedings* are comprised of thirty individual papers covering all preconference, vision, strategy, and tactics sessions presented at the 26th annual conference. A brief schedule regarding the editing of the 2011 papers is provided below:

- Most of the papers were submitted by the deadline of July 15, 2011, or shortly thereafter. While all papers were submitted within a reasonable timeframe, there were two presenters who did not

send their portions for their respective papers. This noncompliance placed extra burdens on the editors.

- The editors continue to use Google Docs to edit the papers.
- The edited papers were uploaded to Taylor & Francis’ CATS online production system in December 2011.
- The proofs were reviewed by the editors and some paper authors in early March 2012.
- *The Proceedings* were published online and in print by Taylor & Francis in April 2012 as volume 62 of *The Serials Librarian*. PDFs of the *Proceedings* were sent to the Electronic Communications Committee and have been posted on the NASIG website.
- The complimentary copies list was compiled by the editors and submitted to Taylor & Francis in March 2012.

This year, the editors purchased and used a second digital recorder for recording the vision sessions. We were happy to be able to quickly and easily transfer the files to the recorders, as well as consult the recordings ourselves (as needed) for editing. Although we offered at the speakers’ breakfast to make an audio-recording for any of the recorders, no one took advantage of the opportunity. Being capable of providing an audio-recording to the recorders and to the speakers who will prepare their own papers is a benefit, and should continue for future conferences. If more speakers begin preparing their own papers, they may want to have an audio-recording especially to capture questions and discussion.

The editors have completed a revision of the *Proceedings Editors’ Manual*. We have also reviewed our portions of the NASIG Working Calendar.

Sara Bahnmaier of the University of Michigan was selected as the new *Proceedings* editor for the 2012-2013 term. She is replacing Wm. Joseph Thomas, who rotates off prior to the 2012 conference.

## Budget

*Proceedings* editors' budget request should retain a note on whatever funding might be required for conference calls should any of needed participant not be able to use Skype.

Submitted on: May 1, 2012

## Continuing Education Committee

Submitted by: Apryl Price

### Members

Apryl Price, chair (Florida State University)  
Lori Duggan, vice-chair (Indiana University)  
Sara Bahnmaier, member (University of Michigan)  
Evelyn Brass, member (retired)  
Melissa Cardenas-Dow, member (University of Redlands)  
Linda Dausch, member (Chicago Public Library)  
Todd Enoch, member (University of North Texas)  
Kelli Lynn Getz, member (University of Houston)  
Stephen Clark, board liaison (College of William and Mary)

### Continuing Activities

- Coordinate and organize webinars. In April, the board approved a subscription to WebEx. The inaugural webinar will be "Effective Negotiation in the 21st Century: From Computer-Mediated Communication to Playing Hardball" on May 22 at 3pm (EST). The presenters are Beth Ashmore (Samford University Library), Jill Grogg (University of Alabama), and Sara E. Morris (University of Kansas). CEC members are learning how to use WebEx, preparing an announcement for marketing, and working with ECC and the treasurer to setup the NASIG registration site. A call for proposals to plan future webinars is forthcoming as well.
- Work with PPC to create a proposal process website or podcast. However, the PPC does not believe the NASIG proposal process is that unique. CEC has sent

the PPC some resources created by EDUCAUSE on the conference proposal process. CEC is awaiting a response from the PPC.

EDUCAUSE Resources

- Website:  
<http://www.educause.edu/ProfessionalDevelopment/TipsforImprovingYourNextConfer/205552>
- Podcast:  
[http://www.educause.edu/blog/gbayne/PodcastWritingSuccessfulPropo/167773?page\\_id=167773](http://www.educause.edu/blog/gbayne/PodcastWritingSuccessfulPropo/167773?page_id=167773)

### Completed Activities

- Investigated and reviewed webinar software and chose WebEx to use for CEC webinars.
- Revised and posted continuing education survey results to share with all members.
- Reviewed and recommended sponsorship of the 2012 OVGTSL and NC Serials Conferences.
- Reviewed proposals from PPC for NASIG 2012 that were not accepted for presentation for possible use as a webinar.
- Wrote a profile of the CEC for the NASIG Newsletter.

### Budget

Budget Category-CEC	2012	Notes
contributions/sponsorships	\$6,000.00	OVGTSL \$1,000; MidSouth E-resource \$1,000; NC Serials
webinar software	\$1,500.00	WebEx \$99/month + audio
<b>TOTALS</b>	<b>\$7,500.00</b>	

### Questions for Board

Can webinar recordings be released for free? If so, how long after the actual webinar?

Submitted on: April 27, 2012



## Database & Directory Committee

Submitted by: Maria Collins

### Members

Maria Collins, chair (North Carolina State University)  
Mary Bailey, vice-chair (Kansas State University)  
Jessica Minihan, member (Georgia Southern University)  
Alice Rhoades, member (Rice University)

### Continuing Activities

The chair and vice chair coordinated with the NASIG Treasurer on invoicing, dues payments and maintenance of the membership directory. Additionally, they responded to the many inquiries from the membership regarding renewals and forgotten passwords. The other committee members were trained on how to process credit card and check renewals. In this way, all committee members had the opportunity either to learn and/or to enhance their skills using the ArcStone software, which NASIG utilizes to manage the membership database and directory, for different activities.

### Completed Activities

Committee members began communicating regularly with ECC to facilitate maintenance of the NASIG list. The incoming chair was trained on the monthly invoicing and reporting processes. Committee members were trained on how to handle credit card and check renewals.

### Budget

The Committee did not use NASIG funds to carry out its functions this year.

## Statistical Information

A snapshot of the NASIG membership indicates there are currently 690 active members, of which 4 are corresponding members. This is an increase from last May's annual report when there were 660 active members with 5 corresponding members. Total membership fluctuates from month to month since membership is on a rolling, twelve month basis and not on a calendar year cycle.

	Active members	Corresponding members
May 2010	754	5
May 2011	660	5
June 2012	690	4

### Membership Patterns of Renewal

The total NASIG membership has increased over the past twelve months. Below are numbers showing membership renewal vs. non-renewal and the addition of new members. The numbers appearing below are for the previous calendar year, 2011. Each member is given a grace period in which to renew his/her membership, and so the compilation of non-renewal statistics lags by several months.

This table shows new member joins, existing member renewals and existing member non renewals for each month. Overall in 2011, 363 existing members renewed their memberships, 183 existing members did not renew or did not renew on time, while 83 new members joined during this time period. The numbers do not add up to the total current membership of 690 because total membership fluctuates from month to month since membership is on a rolling, twelve month basis and not on a calendar year cycle.

<b>2011 Month</b>	<b>New Member Joins</b>	<b>Existing Member Renewals</b>	<b>Existing Member Non Renewals</b>
January	5	22	25
February	11	27	16
March	11	26	34
April	18	17	30
May	13	45	15
June	5	18	10
<b>2011 Month cont.</b>	<b>New Member Joins cont.</b>	<b>Existing Member Renewals cont.</b>	<b>Existing Member Non Renewals cont.</b>
July	3	5	4
August	6	14	6
September	3	6	4
October	5	87	20
November	2	61	10
December	1	35	9
<b>Totals</b>	<b>83</b>	<b>363</b>	<b>183</b>

Submitted on: May 29, 2012

### Electronic Communications Committee

Submitted by: Wendy Robertson and Tim Hagan

#### Members

Wendy Robertson, co-chair (University of Iowa)

Tim Hagan, co-chair (Northwestern University)

Char Simser, vice co-chair (Kansas State University)

Sarah Gardner, vice co-chair (University of California, Davis)

Jennifer Edwards, member (MIT)

Meg Mering, member (University of Nebraska, Lincoln)

Kathryn Wesley, member (Clemson University)

Buddy Pennington, board liaison (University of Missouri, Kansas City)

### Continuing Activities

#### List Activities

The committee continues to maintain email lists and forwarding addresses for NASIG committees. NASIG-L maintenance includes moderating messages, adding and removing subscribers, checking on held subscriptions and updating email addresses. The committee continues to monitor the list spam filters (which get between 1000-2000 messages per week) for legitimate messages on a near-daily basis. The committee also responds to requests for changes to lists as well as troubleshooting any email address problems.

There have been no outages of NASIG lists this year.

#### Website Activities

Meg and Kathryn maintain the NASIG jobs blog (<http://jobs.nasig.org>) and the NASIG blog at (<http://nasig.wordpress.com/>), including cross-posting NASIG blog items on the "What's New" column on the homepage and on Facebook, LinkedIn and Twitter. NASIG-L messages are frequently reposted to the Blog. LinkedIn was enhanced: the discussions area now includes RSS feeds from a limited number of other blogs. In addition to posts from the Blog, posts from Scholarly Kitchen, the UKSG conference blog, and the *NASIG Newsletter* now appear (though there are technical issues with the *Newsletter* - titles of posts don't display - so we need to consult with the *Newsletter* editor).

The committee will put out a call for conference bloggers to help increase our exposure. UKSG did this quite successfully during their recent conference.

The committee continues to respond to requests for assistance from other committees, board members and the membership in whatever way necessary including updating websites and forms and creating new pages for CPC (vendor exhibitor information) and CEC (webinars).

The committee is discussing changing the Resources section to Continuing Education. We believe this would highlight important NASIG activities, such as webinars, and help keep the website relevant for members.

The committee continues to update the ECC manual wiki at <http://nasigeccmanual.pbworks.com/>. Any issues that could not be resolved by the committee have been forwarded to Abigail Bordeaux, our ArcStone liaison, and have been addressed with their help. We try to think of ways to streamline our work so that we can focus attention on the most important things for the organization.

The committee will pay attention to the conference website using mobile devices to determine if it is adequate for our needs or if we need to investigate alternatives next year.

## **Completed Activities**

### List Activities

Redesigned the NASIG-L footer to eliminate accidental unsubscribing.

The committee began adding non-member conference attendees to NASIG-L in order to facilitate conference related communication among all attendees. This communication was formerly managed through the discussion forums.

The committee took steps to streamline member communication to the ECC by combining two contact emails ([list@nasig.org](mailto:list@nasig.org) and [web@nasig.org](mailto:web@nasig.org)) into a single point for all requests ([web@nasig.org](mailto:web@nasig.org)). [List@](mailto:List@) will indefinitely forward to the [web@](mailto:web@) address.

Settings for all lists were altered to allow addressees to see all recipients of an email.

The committee modified all NASIG lists to all for cross posting among the lists.

### Website Activities

The committee recommended to the Board that conference presentations be moved from the members-only section of the website to Slideshare, <http://www.slideshare.net/NASIG>. The 2012 conference presentations will be available through an "Event" site. Tagging guidelines have been established and ECC has provided instructions for PPC to share with presenters, including those who do not have their own Slideshare accounts.

The committee added a new page on webinars in a prominent location. The out-of-date page on library catalogs was removed.

The forums were removed from the website because they were rarely used. NASIG-L is now the place for all discussion.

Image sizing standards for sponsors and organizational members were established. Image files in the directory structure for the website were reorganized by Char when we realized that images, including many duplicates, resided in 3 different locations. New folders were set up, naming conventions were established, and existing files were renamed and relinked. CPC used the new structure for the 2012 conference sponsors page. Documentation was updated.

Wendy mounted the *2011 Conference Proceedings* ([http://www.nasig.org/conference\\_proceedings/2011.cfm](http://www.nasig.org/conference_proceedings/2011.cfm)) and the page was proofread by Char.

An annual review of the website to identify out of date and missing content was conducted.

We documented and transferred all of our photo archiving information to the new NASIG photo historian.

The current Twitter feed is being archived in a Google spreadsheet. The tweets from the 2011 conference through Dec 2011 were archived in Twapper Keeper. At

this service's demise, these were also archived into a Google spreadsheet.

Twitter, Facebook, LinkedIn and Flickr icons were added to the website homepage.

### Budget

Budget Category	2012/2013 estimate
Conference Calls	\$0.00
Contracted Services	\$0.00
Bee.Net (\$500 per month – web email and listservs)	\$6000.00
ArcStone (NASIG website and association management - \$300 per month) (the total figure includes \$1450 for 10 hours programming in case it is needed)	\$5050.00
Survey Monkey (online surveys)	\$204.00
SlideShare Pro (conference presentations)	\$114.00
UKSG Newsletter	\$1725.00
Contingency	\$0.00
<b>Total</b>	<b>\$13,093.00</b>

### Statistical Information

- NASIG has 26 listservs
- NASIG has 27 active @nasig.org email addresses
- There are 710 subscribers to NASIG-L (629 members and 81 non-member conference attendees)

### Website Visitors This Past Year (from Google Analytics)

May 2011	4381
June 2011	3499
July 2011	1499
August 2011	1784
September 2011	1564
October 2011	1941
November 2011	1591

December 2011	1344
January 2012	2852
February 2012	3803
March 2012	3217
April 2012	3105
<b>Total</b>	<b>30580</b>

### Top 10 Landing Pages, May 1, 2011-April 30, 2012:

<a href="http://www.nasig.org/">http://www.nasig.org/</a> + <a href="http://www.nasig.org/index.cfm">http://www.nasig.org/index.cfm</a>	19117 + 6669 = 25786
<a href="http://www.nasig.org/conference_registration.cfm">http://www.nasig.org/conference_registration.cfm</a>	14860
<a href="http://www.nasig.org/conference_program.cfm">http://www.nasig.org/conference_program.cfm</a>	5791
<a href="http://www.nasig.org/registrationcontent.cfm">http://www.nasig.org/registrationcontent.cfm</a>	5386
<a href="http://www.nasig.org/about_history.cfm">http://www.nasig.org/about_history.cfm</a>	4445
<a href="http://www.nasig.org/members_directory.cfm">http://www.nasig.org/members_directory.cfm</a> + <a href="http://www.nasig.org/members_directory.cfm?search=true">http://www.nasig.org/members_directory.cfm?search=true</a>	3047 + 2388 = 5435
<a href="http://www.nasig.org/nasig_membership.cfm">http://www.nasig.org/nasig_membership.cfm</a>	2791
<a href="http://www.nasig.org/conference_hotel.cfm">http://www.nasig.org/conference_hotel.cfm</a>	2629
<a href="http://www.nasig.org/about_committees.cfm">http://www.nasig.org/about_committees.cfm</a>	2242
<a href="http://www.nasig.org/member_login.cfm">http://www.nasig.org/member_login.cfm</a>	2230
<a href="http://www.nasig.org/conference_preconferences.cfm">http://www.nasig.org/conference_preconferences.cfm</a>	2122

Blog stats reflect the period Jan.-Dec. 2011

Visitors to the Jobs Blog : 19,863

The Jobs blog was set up in Aug. 2010 and thru Dec. 2010 had approximately 4,800 hits. Hits for the first four months of 2012 are showing another huge increase in visitors, almost 11,000 as of 4/27/12.

Visitors to the NASIG Blog : 7,700 (almost double the total for 2010)

### Questions for Board

We have been collecting tweets related to NASIG in a Google spreadsheet

(<https://docs.google.com/spreadsheet/ccc?key=0AkSPpYhslyvzdDhKQTd1YUlyVzJOd0htQm81eDFVMWc>).

Tweets previously had been in Twapper Keeper, which ceased to exist about January 1 and so those tweets were also collected in a Google spreadsheet

(<https://docs.google.com/spreadsheet/ccc?key=0AkSPpYhslyvzdEICbkw1bG5ETzhsd3ILZFILZ2JwWnc>). These

links have not been publicized in any way. Should we link to these from the website? Should this responsibility go to the Historian? Should we even bother to collect tweets by and about NASIG?

Past conference handouts and proceedings are linked from pages that are restricted to members only. However, if you copy the link to any of these items, they are accessible without login. This needs to be resolved, particularly for the *Proceedings*. This may have been an issue for several years (all the *Proceedings* being accessible) and no one has reported a problem. ECC will follow up with ArcStone to see how this can be corrected.

With conference handouts moving to Slideshare for 2012, ECC awaits a decision from the Board concerning previous years' presentations materials. Should all presentations be freely available (though as per the previous question, they are accessible if an individual has the URL)? Should preconference materials be considered on a case-by-case basis--some should be left as members-only, others free?

### Recommendations to Board

We would like to make the following changes to the website:

- Change "Resources" in top green bar to "Continuing Ed". All web pages in the current Resources pages would continue to be named resources\_XXX.cfm
- Remove "Forms" from the "Continuing Ed" sidebar.
- Add Forms to "About NASIG" sidebar below "Policies". This should link to [http://www.nasig.org/about\\_forms.cfm](http://www.nasig.org/about_forms.cfm)

Submitted on: May 2, 2012

### Financial Development Committee

Submitted by: David M. Bynog

#### Members

David Bynog, vice-chair (Rice University)

Elizabeth Parang, chair (Pepperdine University)

Joe Badics, member (Eastern Michigan University)

Zac Rolnik, member (Now Publishers)

Christine Stamison, member (Swets Information Services)

Rob Van Rennes, member (University of Iowa)

Lisa Blackwell, ex-officio (Nationwide Children's Hospital Medical Library)

Katy Ginanni, board liaison (West Carolina University)

#### Continuing Activities

The committee continues to review possibilities for increased revenue.

#### Completed Activities

Members of the committee met at the annual conference in St. Louis to discuss expectations of work on the committee. While the committee spent much of the previous year working with the *NASIG Newsletter* to establish guidelines for advertising in the newsletter; to

date, no inquiries have been received concerning advertisements in the *NASIG Newsletter*.

## **Budget**

The committee conducted all business via e-mail and had no expenses.

Submitted on: May 2, 2012

## **Membership Development Committee**

Submitted by: Sarah Tusa

## **Members**

Sarah Tusa, chair (Lamar University)  
Steve Kelley, vice-chair (Wake Forest University)  
Pat Adams, member (Swets Information Services)  
Janie Branham, member (Southeastern Louisiana University)  
Jen Frys, member (SUNY Buffalo)  
Janet Arcand, member (Iowa State University)  
Rick Anderson, member (University of Utah)  
Robert Boissy, board liaison (Springer Science+Business Media)

## **Continuing Activities**

- The Committee continues to contact non-renewing members, giving them personalized instructions on how to renew their membership and corresponding with appropriate NASIG officers to aid those who had difficulties.
- Committee members are contacting appropriate vendors listed as ALA 2012 exhibitors to encourage them to consider organizational membership.
- Committee members will continue to send welcome letters to new NASIG members.

## **Completed Activities**

- 29 members who had not renewed through December 2011 have been contacted by e-mail and

- given information on how to renew their memberships. Added to the totals from previous reports, this quarter's efforts bring us to a total of 146 renewal reminders sent by MDC in 2011/2012.
- Sarah Tusa sent a copy of the approved draft plan for a drawing at the First-Timers' Reception to Sarah Sutton in January 2012, and sent a follow-up e-mail about the proposed drawing at the First-Timers' Reception. Still awaiting status update.
- Rick Anderson completed an action item to draft wording on a proposal to conduct a drawing for one free year of membership for an active NASIG member who recruits a new NASIG member.
- Sarah Tusa drafted a design for the membership flyer, with input from the committee, which is to replace the brochure that was updated by the MDC in spring 2011.
- The committee conducted an e-mail discussion on the question of follow-up to the non-renewals after our initial reminders, but decided to wait for the results of the impending membership drive.

## **Budget**

A 2012 budget of \$10.20 was submitted on October 13, 2011.

## **Actions Required by Board**

Current actions:

- Sarah Tusa scheduled and conducted a conference call of committee members to discuss strategies for promoting organizational memberships. The conference call took place on February 15, 2012. All MDC members participated.
- Steve Kelley completed an action item to draft a letter of invitation to library-oriented corporations to promote organizational memberships.
- Rick Anderson drafted a letter to welcome new members and Sarah Tusa coordinated with Maria Collins of D&D to receive names and contact information of new members on an ongoing basis.
- Janet Arcand retrieved an Action Item from 2011 that Sarah Tusa had submitted, included here: To encourage attendance at the First-Timers' reception, it seems to me that someone from the

Membership Development Committee could coordinate with the Local Arrangements Committee to arrange for a drawing among those first-timers who attend the reception. The drawing could either be held during the reception – probably an hour after it starts – or the next morning during announcements. It would probably involve placing a ticket either in the packets of those who are first-timers, or simply handing out tickets at the reception. We would need to purchase a roll of tickets such as those that are given out at fairs. Someone gives a ticket to the first-timers – presumably identified by a dot on the name tag – and keeps the corresponding duplicate ticket. For each ticket given out, the corresponding duplicate ticket goes into a bowl or similar receptacle.

Again, the drawing could either take place during the First-Timers reception or the next morning during the announcements that generally take place before the morning (usually “Vision”) session. [Per Janet Arcand: “I think the item was shelved at that point because we were never going to be able to get it okayed or organized in time for last year’s conference. Perhaps now is time to restart on this one.”]

- The MDC began promoting organizational memberships in mid-April, based on leads provided by Bob Boissy during the Christmas holidays.
- Rick Anderson is working on ideas for using Facebook and LinkedIn for promoting NASIG membership.

Future activities:

- The MDC will continue to pursue avenues to invite appropriate publishers, corporations and organizations to start an organizational membership with NASIG.
- In 2010 the Board had approved the idea of using Facebook and LinkedIn for promoting membership. The committee will draft a plan in Summer 2012 to tie it to the membership-drive initiative.
- The Board has asked the Committee to contact the Mentoring Group and ask for them to encourage members to stay in touch with mentees for the entire year. Janie Branham has agreed to contact the Group, but we had a question for the Board

about the protocols of doing this, and the Mentor volunteer letter has already gone out for the 2011 conference. This idea will be followed up by MDC in 2012/2013. No new information on the question of protocol was forthcoming from the Board in 2011/2012.

- The Committee will follow up with past NASIG award winners to see if they are still members, and will contact any non-Members to urge them to rejoin NASIG.
- The Committee will schedule at least one conference call in 2012/2013 to continue brainstorming about ways to strengthen membership numbers, as this activity is an ongoing directive.

### Questions for Board

- Does NASIG have a Facebook page?
- Between the Membership Development Committee and the First-Timers’ Reception Committee, who needs to purchase the tickets for the drawing? Since the MDC’s draft was accepted as is – i.e., without a budgeted figure for purchasing a roll of tickets – we hope that the Board will supply the First-Timers’ Reception committee with the funds to purchase the tickets for the drawing.

Submitted on: April 21, 2012

### Nominations & Elections Committee

Submitted by: Pam Cipkowski

#### Members

Pam Cipkowski, chair (Loyola University Chicago School of Law)

Christine Radcliff, vice-chair (Texas A&M University-Kingsville)

Rochelle Ballard, member (Princeton University)

Jana Brubaker, member (Northern Illinois University)

Melanie Faithful, member (IOP)

Mark Henley, member (University of North Texas)

Trina Nolen, member (Lamar University)

Paula Sullenger, member (Auburn University)  
Suzanne Thomas, member (University of Pittsburgh)  
Katy Ginanni, board liaison (Western Carolina  
University)

### **Continuing Activities**

April-May 2012: The Call for Nominations form should be revamped for inclusion with this year's conference packet and sent to the NASIG Secretary. The working calendar will also need to be revised. Some minor changes and clarifications are being made to the N&E Committee Manual before the new Chair takes charge.

### **Completed Activities**

June 2011: The committee had its initial meeting at the 2011 conference. A Call for Nominations was distributed at the conference as part of the conference packet. The nomination form was also available on the NASIG website. The existing timetable from the previous election cycle was revised.

July 2011: The nominations form on the NASIG website was revised, tested, and reactivated. The first Call for Nominations e-mail blast was sent out to the NASIG membership. The Call for Nominations was also posted in the "What's New" section of the website.

August 2011: Additional e-mail blasts were sent to the membership reminding people to submit nominations. A problem with the nominations form was discovered during this time: once people have used the form to submit a nomination or nominations, they cannot go back to the form at a later date and use it again. The Electronic Communications Committee investigated the issue and reasoned that if you are logged into the website, it will let you fill out the nominations form only once, but if you aren't logged into the website you can fill it out as many times as you want. It was suggested that we may want to consult with ArcStone to see if there is some way to let members who are logged in fill something out more than once.

September 2011: Additional e-mail blasts were sent to the membership reminding people to submit nominations.

October 2011: The deadline for submitting nominations was Oct. 17. Four individuals were nominated for Vice President/President-Elect, seven for Secretary, and sixteen for Member At Large. Four of the individuals nominated for Secretary were also nominated for Member At Large. A conference call took place on Oct. 18 to discuss the next steps of the process. The committee members then contacted each person nominated to determine their willingness to run for the position(s) for which they were nominated.

November 2011: After the committee contacted everyone who was nominated, two individuals agreed to be considered for the ballot for the office of Vice President/President-Elect, three for Secretary, and eight for Member At Large. The nominees all submitted their profile information to the committee by the Nov. 21 deadline. The three nominees for Secretary were also nominated for Member At Large, and all three stated their interest for either position, knowing that they would only be slated for one of the positions if they made it onto the ballot.

December 2011: The committee held another conference call to go over the nominees' profile information and discuss the reference process. In the past, several individuals were asked to be references for sometimes up to 5 or 6 nominees. Therefore, in order to reduce the time it takes to fill out the information on all the reference forms, a few changes were made to form. Instead of the form listing only open-ended questions, references were instead given a list of attributes and asked to evaluate each nominee on a scale of 1 to 5. A few open-ended questions were left at the bottom of each form if the references wished to supply additional information.

January 2012: Committee members completed checking candidate references by Jan. 20. Another conference



call was held to formalize the final rankings and set the slate for the ballot. Nominees were then contacted and notified whether they had been slated on the ballot or not. The slate was finalized and announced to the Board as a courtesy on Jan. 30.

February 2012: The slate of candidates was announced to the general NASIG membership on Feb. 1. On Feb. 2, a Call for Petition Candidates was sent out. Standard nominee profiles were due from the slated candidates on Feb. 17, and petitions with supporting documentation were due from petition candidates by Feb. 20. There were no petition candidates this year. The ballot was finalized and made available electronically to the membership on Feb. 27. Online voting ended 10 working days after the election started, which was Mar. 12.

The final ballot (those elected are marked with an asterisk \*):

#### **Vice President/President-Elect**

Lisa Blackwell, Nationwide Children's Hospital

\*Joyce Tenney, University of Maryland, Baltimore County

#### **Secretary**

Morag Boyd, Ohio State University

\*Shana McDanold, University of Pennsylvania

#### **Member-at-Large (3 to be elected)**

\*Chris Brady, U.S. Dept. of Justice

Angela Dresselhaus, Utah State University

Kelli Getz, University of Houston

\*Tim Hagan, Northwestern University

\*Selden Durgom Lamoureux, North Carolina State University Libraries

David Winchester, Washburn University

#### **Budget**

The budget for N&E has been reduced over the years because voting is now online. The only items for which

we needed to budget were the three conference calls we placed in October, December, and January. The original budget of \$250 we requested was adequate to cover those costs.

#### **Statistical Information**

A total of 22 individuals were nominated for office. Five of those were nominated for more than one office.

Of those, 12 declined to be vetted further:

- 2 were nominees for Vice President/President-Elect
  - 4 were nominees for Secretary
  - 8 were nominees for Member-at-Large
- (Again, numbers don't quite match up because some were nominated for more than one office, and some agreed to be vetted for one office and not another.)

The final ballot was composed of:

- 2 nominees for Vice President/President-Elect
- 2 nominees for Secretary
- 6 nominees for Member-at-Large

#### **Recommendations to Board**

The election went relatively smoothly, despite a few limitations with the software in soliciting nominations (once you submitted the form once, you could not go back another day and submit more nominations) and in voting (no mechanism to tell if you were voting for too many candidates). The Board may wish to investigate if a more sophisticated system could be put in place. Overall, though, the current software did not compromise the integrity of the voting.

The Chair would like to thank the Vice Chair and committee members for all their time and hard work. Members spent much of their time soliciting nominations for the offices, evaluating profile packets, calling references, and helping to test the software before the actual election. Members of the ECC were also a great help to our committee. Special thanks also

to board liaison Katy Ginanni for her guidance throughout the year.

Submitted on: May 1, 2012

## **Program Planning Committee (PPC)**

Submitted by: Michael Hanson

### **Members**

Michael Hanson, chair (Lafayette College)  
Karen Davidson, vice-chair (Mississippi State University)  
Kathy Brannon, member (Ingram-Coutts Information Services)  
Anna Creech, member (University of Richmond)  
Rubye Cross, member (Georgia Tech University)  
Cris Ferguson, member (Furman University)  
Kathy Kobyljanec, member (John Carroll University)  
Anne Mitchell, member (Stimson Library U.S. Army Academy of Health Sciences)  
Diana Reid, member (University of Louisville)  
Jean Sibley, member (College of William & Mary)  
Paoshan Yue, member (University of Nevada, Reno)  
Patrick Carr, board liaison (East Carolina University)

### **Continuing Activities**

PPC continues their dialog with the Continuing Education Committee (CEC) concerning CEC using the PPC's presentation collection to identify potential presenters for NASIG sponsored webinars and regional presentations. PPC forwarded a group of presentation proposals rejected for the conference to CEC for consideration. PPC and CEC also discussed the construction of a NASIG webpage coaching potential presenters on how to write a presentation proposal that would improve the likelihood of a presentation being accepted. It was originally determined that such a site was not necessary in PPC's eyes, as more generic web resources exist that communicate all materials pertaining to writing a good proposal for the NASIG

conference. However, considering some conversations with ECC, PPC began to consider a webpage with broader assistance to conference presenters and potential presenters, linking not only to external sources on writing successful presentation proposals, but also communicating information on formatting handouts and storing presentations on Slideshare and the like.

Michael Hanson will continue as an ex-officio member of PPC, tasked with editing the revised PPC manual authored by Anne Mitchell and putting it up on a wiki. Michael will also be drafting a MOU for pre-conference speakers.

### **Completed Activities**

#### 2012 Conference Program Slate

The principal business for the Program Planning Committee in 2011/2012 was to develop and oversee the execution of the program for the 2012 conference in Nashville, TN.

#### 1) Vision Speakers.

Two Vision speakers were selected by PPC and approved by the board. A third vision speaker was added from the conference presentation proposals due to the general interest in the topic and speaker. Lynn Connaway, Kevin Smith, and Rick Anderson were slated as vision speakers.

#### 2) General Conference Program

PPC broadcast two calls for conference presentation proposals, receiving 49 proposals. After PPC deliberated, 29 proposals were accepted, 27 as conference sessions, one as a pre-conference, and one as a Sunday vision session. There was no attrition of programs this year.

This year, presentations that were rejected due to the preliminary nature of the data were encouraged to resubmit for the 2013 conference. We hope to see a number of these presentations next year, though proposers will have to resubmit their proposals. We also forwarded a number of declined presentations to CEC for consideration as webinars or regional unconferences.

### 3) Pre-conferences

PPC described 3 pre-conferences and identified presenters. A fourth pre-conference arose from an excellent conference presentation proposal. The pre-conferences consisted of an 8 hour RDA preconference extending over two days, and half day pre-conferences concerning e-book cataloging, using a Drupal database to track electronic resource licenses, and Making the leap to Library Middle Management. The RDA serials preconference made the cap of 30 attendees. The e-book cataloging pre-conference had 17 attendees, the Drupal license class had 6 attendees, and the middle management class had 7.

Though only 2 of the 4 pre-conferences exceeded the guideline of having 10 attendees sign up, it was determined that the cost of canceling the pre-conferences exceeded that of holding them with the less than 10 attendees and so all 4 went forward.

### 4) Poster Sessions

The call for poster sessions received 6 responses. Poster sessions were available on June 9<sup>th</sup>, from 9 a.m. to 5 p.m. with presenters available during the afternoon break.

### 5) Informal Discussion Groups

PPC continued last year's practice of mediating rather than organizing informal discussion groups. In response to the IDG call, 9 presenters responded.

### 6) Schedule

Another responsibility of PPC is setting the daily schedule for conference events. At the commencement of this planning cycle, members of PPC moved to change the program structure from having two types of conference breakout programs (90 minute "strategy" sessions and 60 minute "tactics" programs) to single, 60 minute conference sessions. The change was made with a view to streamline presentation content to concise information and to free up time for more presentations. The proposal was approved by the Board, reflected in the call for proposals and conference planning, and implemented in this year's conference. PPC looks forward to examining this year's conference evaluations for comments on the new format in deciding, with the Board, on the continuance of this practice.

PPC also moved and the Board approved to change annual committee meetings from a dedicated time on Saturday afternoons to a slot during Saturday breakfast. This was done to allow for more conference sessions.

In addition to the annual business meeting, a special report and discussion session mediated by the task force on core competencies of electronic resources librarians was added.

### 7) PPC supported the Electronic Communication

Committee's (ECC) move to digitally house conference handouts at a SlideShare account. PPC requested that ECC find a solution where conference presenters could upload their presentations and handouts, rather than having to go through ECC or any other committee mediation. We were delighted that originally Slideshare provided this capability and that ECC, with Anna Creech's assistance, allowed for this conference to have this feature. However, Slideshare discontinued this service prior to the conference, and so we had to return to the old, ECC mediated procedure. PPC maintains its request and advice that we find a solution to

allow presenters to upload presentations and handouts at their own discretion, rather than making them send such documentation to a committee for posting.

## **Budget**

### 1) Reimbursement Guidelines and Conference Session Speaker Costs

With the change in schedule and program format, associated changes occurred in the reimbursement policy as well. All conference session speakers were offered a half waiver for their presentations, for up to 3 speakers. A total of 51 speakers costs estimates at \$9,562.50. This cost compares to \$10,875 for last year.

### 2) Vision Speakers Costs

For vision speakers, compensation packages were individually negotiated. Vision speakers' expenses for honorarium, travel and lodging expenses, and waived registrations came to \$3,571.20, which is less than last year's estimated vision speaker costs of \$5,601.84 and principally due to the reduced honorarium costs.

### 3) Pre-conference Costs

For pre-conference speakers, the standard compensation is half-price conference registration and 2 nights lodging, but compensation was negotiated with invited speakers. Estimated costs amounted to \$3,061.00. CPC had associated costs for AV, catering, etc. and we incurred some modest costs for materials. Despite the lackluster showing of some of the sessions we still calculate that they made money.

### 4) Committee Costs

PPC committee costs center around travel and accommodations to the fall board meeting/site visit, the winter board meeting, committee conference calls, and the May vice-chair site visit. The committee's expenditures for 2011 were \$1,903.19. This was higher

than the \$1,250.00 budgeted as travel costs exceeded the budgeted amount projected. We made more realistic projections for the 2012 budget.

## **Actions Required by Board**

Approve updated PPC manual

Comment and then approve Pre-conference MOU's

## **Questions for Board**

Procedure for 2013 conference final day vision speaker session.

## **Recommendations to Board**

When examining new registration software, please look for features that would allow conference presentation proposal gathering as well. Currently Survey Monkey is used to collect presentation proposals and then an excel file is sent to the registrar to input into that system. Anna Creech mentioned that there are holistic systems which can take care of the collection and registration.

We also ask the board to look for a software solution so that presenters can upload their presentations and handouts on their own and don't have to send them to ECC or any other body to upload them for them.

## **Publications and Public Relations Committee**

Submitted by: Jeannie Castro

## **Members**

Jeannie Castro, chair (University of Houston)  
Bob Persing, vice-chair (University of Pennsylvania)  
Jennifer Bazeley, member (Miami University)  
Eleanor Cook, member (East Carolina University)  
Joyce Tenney, member (University of Maryland,  
Baltimore County)

Amanda Price, publicist (Mississippi State University)  
Steve Shadle, board liaison (University of Washington)

### Continuing Activities

The Publications portion of Pub/PR has specifically laid dormant waiting for the work of the Core Competencies group to finish. This group's work will help frame future direction for organization publication activity. We have continued to draft/distribute conference and webinar-related announcements. The committee also identified local library conference to assist with conference marketing.

### Completed Activities

Drafting and distributing conference and webinar-related announcements

### Budget

None.

Submitted on: May 21, 2012



## Student Outreach Committee

Submitted by: Eugenia Beh and Kate Seago

### Members

Eugenia Beh, chair (Texas A&M University)  
Kate Seago, vice-chair (University of Kentucky)  
Kara Killough, member (Serials Solutions)  
Marcella Leshner, member (St. Mary's University)  
Dylan Moulton, member (Springer Verlag)  
Sara Newell, member (University of North Carolina – Chapel Hill)  
Kristen Wilson, member (North Carolina State University)  
Patrick Carr, board liaison (East Carolina University)

### Continuing Activities

The committee continues to recruit new ambassadors through announcements in the *NASIG Newsletter* and through personal contact at the NASIG annual meeting. The committee will focus on more face-to-face contact with NASIG members to let them know about the Ambassadors Program and will provide a common time and place for ambassadors and committee members to meet at the annual conference.

### Completed Activities

- Sarah Sutton will be the new Student Outreach ambassador for Emporia State University, in addition to Texas Women's University.
- Requested copies of the *2011 NASIG Proceedings* for 5 Student Outreach Ambassadors (Kate Seago, Sarah Sutton, Sanjeet Mann, Joseph Hinger and Eugenia Beh).
- Provided copy of Student Outreach brochure and handout for NASIG Annual Conference vendor expo to board liaison, Patrick Carr.

Ambassadors are assigned to the following universities:

Ambassadors	Schools
Sarah Sutton	Emporia State University
Angela Dresselhaus	Indiana University
Kate Seago	University of Kentucky
Linda Smith Griffin	Louisiana State University
Susan Chinoransky	University of Maryland
Emma Cryer	University of North Carolina-Chapel Hill
Bob Boissy	Simmons, Syracuse, SUNY Albany
Carol Ann Borchert	University of South Florida, Florida State University
Carol Green	University of Southern Mississippi
Joseph Hinger	St. John's University, Queens College
Eugenia Beh	University of Texas, Austin
Sarah Sutton	Texas Woman's University
Sanjeet Mann	UCLA
Patrick Carr	Valdosta State University
Alita Pierson	University of Washington

### Budget

NOTES	2011-2012 YTD
Copies of brochure and handout	\$20.00
Ribbons for ambassadors	\$50.00
	\$0.00
<b>Total</b>	<b>\$70.00</b>

### Questions for Board

Kate Seago has graciously offered to make copies of the brochure and handout (75 copies for each, per Patrick's recommendation). Would it be possible to reimburse Kate for the cost?

Submitted on: May 1, 2012

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